The Charter Institute at

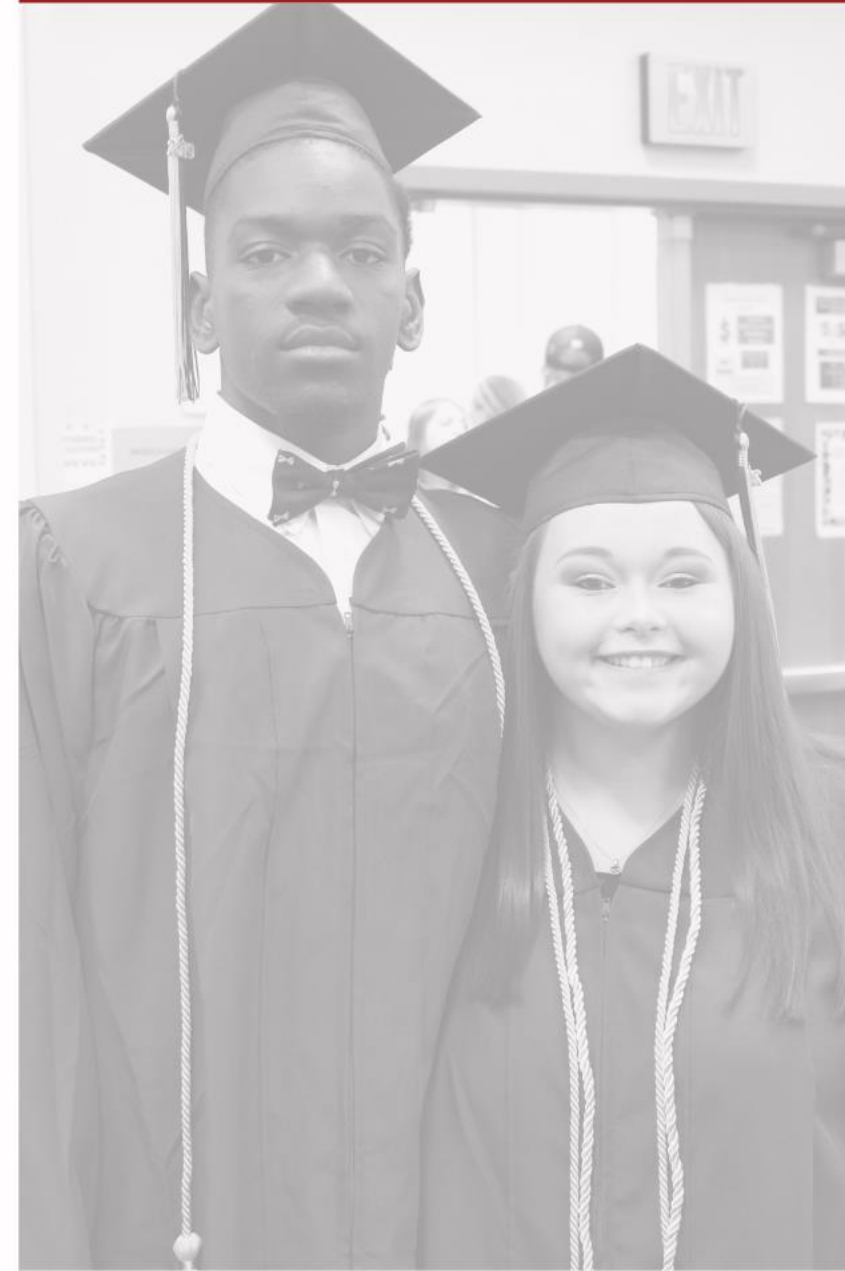# Erskine

Finance & Federal Programs Training

December 9, 2019

Wireless Information:

Network – Famously Hot Spot
Password – capconnect (*all lowercase*)

CREATIVE MINDS
INNOVATIVE SCHOOLS
EFFECTIVE RESULTS

CHARTER INSTITUTE
at ERSKINE

Finance

Education Finance Act and Education Improvement Act

Ciera Bing
Executive Director of Finance

John Li
Director of Finance

Finance Office Expectations

- Process funding out to schools within the Institute on a timely manner (<=10 business days)
- Coordinate with Institute PowerSchool team to ensure accurate enrollment data
- Financial Reporting
  - School Sustainability
  - School Audit
- Prepare annual budget requests to the Governor's office, Education Oversite Committee, and other state agencies

School Expectations

- Schools must adhere to funding requirements
- Schools must have adequate internal control systems
- Schools must comply with all state and federal laws and regulations
- Schools must comply with their charter contract
- Schools must meet performance expectations
- Schools must meet all reporting requirements completely and on time

December Funding

- Tentative SCDE Deposit Date- 12/13/19

- Tentative Institute Deposit Date- 12/20/19

- Funding will be adjusted in January 2020 to reflect the 45 Day Count

EFA and Charter Funding

- EFA- $2,489.00
  - Prepare in the event of a BSC Cap

- Charter School Funding: Brick and Mortar- $3,600.00
- Charter School Funding: Virtual- $1,900.00

EFA Weightings

- Special Education Instruction
  - The number of minutes needed to receive the Special Education weighting is to be based on the student's IEP.

- Vocational Weighting
  - Students eligible for Vocational weighting must be enrolled in an approved CTE courses in grades 9-12.

Add-On Weightings

- Coding students as GTA under the EFA High Achieving tab indicates that the students have been officially identified as GTA students and are being served in Gifted and Talented courses. If this is not the case, meaning the students have been officially identified as GTA but are not being served in Gifted and Talented courses (or vice versa), then the student should not be coded as GTA under the EFA High Achieving tab.

- Coding students as GTR under the EFA High Achieving tab indicates the students have been officially identified as GTR students and are being served in their Gifted and Talented area of strength.

- If a student is enrolled in an AP or IB course in grades 9-12, regardless to whether they are identified as GT or not, then they can be coded as AP or IB under the EFA High Achieving tab. AP or IB enrolled students who are not identified as GT should not be coded under GTA because to do so would send the message that they have been officially identified as GT. However students who are identified as GT and are enrolled in a Gifted and Talented, AP or IB course can be coded as GTA, GTR, AP or IB as it applies for the student. Keep in mind that the High Achieving add-on weighting is only awarded once for the eligible student.

EIA Funds

- Reading Coaches must be salaried position, not contracted
  - Must be coded to 87 in PCS

- School Nurses must be salaried position, not contracted
  - Must be coded to 36 in PCS

- Aid to Districts Technology is no longer funded

SCDE Resources

- Funding Manual
  - https://ed.sc.gov/finance/financial-services/manual-handbooks-and-guidelines/funding-manuals/fy-2018-2019-funding-manual/

- Financial Accounting Handbook
  - https://ed.sc.gov/finance/auditing/manuals-handbooks-and-guidelines/financial-accounting-handbook/fy-2018-19/financial-accounting-handbook-2018-19-updates/

School Budget

- As outlined in the charter contract, preliminary budget for the next fiscal year is due on April 30th via LWS

- Final board adopted budget is due to the Institute on July 1st via LWS

Audit Requirements

- SECTION 59-40-50 (3) adhere to the same financial audits, audit procedures, and audit requirements as are applied to public schools.

- SECTION 59-40-60 (6) evidence that the plan for the charter school is economically sound, a proposed budget for the term of the charter, a description of the manner in which an annual audit of the financial and administrative operations of the charter school, including any services provided by the school district, is to be conducted.

- Source-SC Code of Laws Title 59-Chapter 40
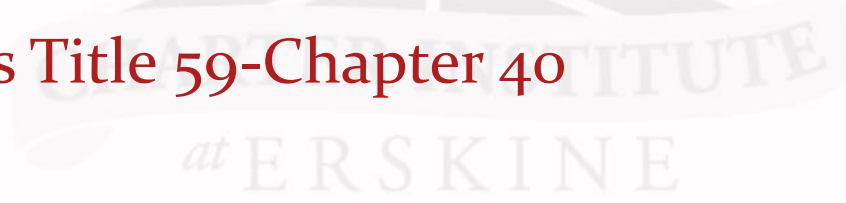
Audits Engagement Letter

- Audit Engagement Letter is due to the Institute via LWS by June 1 each year

Audited Financials

- Audited Financial Statement is due to the Institute via LWS by November 1 each year

Financial Transparency

- Financial records are subject to Freedom of Information Act (FOIA)

- Schools' annual audit will be posted to the Institute's website

Journal Entries

- Due by the 30th of each month via LWS
- Please ensure that the Journal Entry is balanced (Debit equals Credit)

- If you are missing account codes, please email Ashley Sturkie (fiscalcoordinator@erskinecharters.org)
    - Include Fund, Function, Object, and Modifier (xxx-xxx-xxx-xxxx-xx)
    - Include the name of the account

Student Success Profile

- Pursuant to S.C. Code Ann. § 59-40-55 (B) (4) states that a charter school sponsor shall "monitor, in accordance with charter contract terms, the performance and legal/fiscal compliance of charter schools to include collecting and analyzing data to support ongoing evaluation according to the charter contract."

- The SSP- Finance is designed to assess the near-term financial health, the long-term financial sustainability, and the financial management of the charter schools in the Institute.

- The SSP- Finance provides tools for the Institute to recognize schools' financial performance and fiscal compliance to ensure that our charter schools are financially stable and financially viable.

SSP- Performance Ratings

- Status determines whether a charter school Exceeds Standard, Meets Standard, Approaching Standard or Does Not Meet Standard.

- Exceeds Standard and Meets Standard indicates that the charter school does not reflect financial risk in this measure.

- Approaching Standard and Does Not Meet Standard indicate that the charter school reflect financial risk and does not meet the expectation of the measure.

- Schools that are identified as Approaching Standard and Does Not Meet Standard must work with the Institute as outline in the Institute Interventions

Near-Term Financial Health

- **Assets to Liabilities Ratio**

- The current ratio represents the relationship between a school's current assets and current liabilities. The current ratio measures a school's ability to pay its obligations over the next 12 months. A current ratio of greater than 1.0 indicates that the school's current assets exceed its current liabilities, thus indicating ability to meet current obligations. A ratio of less than 1.0 indicates that the school does not have sufficient current assets to cover the current liabilities and is not in a satisfactory position to meet its financial obligations over the next 12 months.

Near-Term Financial Health

- **Unrestricted Days Cash on Hand / Fund Balance Percentage**

- The unrestricted days cash on hand ratio indicates how many days a school can pay its expenses without another inflow of cash. The unrestricted days cash ratio indicates whether or not the school has sufficient cash to meet its cash obligations. Depreciation expense is removed from the total expenses denominator because it is not a cash expense.

Near-Term Financial Health

- **Enrollment Variance**

- Enrollment variance indicates whether or not the school is meeting its enrollment projections. The enrollment variance depicts actual versus projected enrollment. A school budgets based on projected enrollment but is funded based on actual enrollment; therefore, a school that fails to meet its enrollment targets may not be able to meet its budgeted expenses.

Near-Term Financial Health

- **Debt Default**

- Debt default indicates whether or not a school is meeting debt obligations or covenants. These metric addresses whether or not a school is meeting its loan covenants and/or is delinquent with its debt service payments. A school that cannot meet the terms of its loan may be considered in financial distress.

Long-Term Financial Sustainability

- **Total Margin**

- Total margin indicates the deficit or surplus a school yields out of its total revenues; in other words, it measures whether or not the school is living within its available resources. The total margin measures whether a school operates at a surplus (more total revenues than expenses) or a deficit (more total expenses than revenues) in a given time period.

Long-Term Financial Sustainability

- **Cash Flow**

- The cash flow indicates a school's change in cash balance from one period to another. Cash flow indicates the trend in the school's cash balance over a period of time. This measure is similar to days cash on hand but indicates long-term stability versus near-term.

Long-Term Financial Sustainability

- **Debt Service Ratio**

- The debt service coverage ratio indicates a school's ability to cover its debt obligations in the current year. This ratio measures whether or not a school can pay the principal and interest due on its debt based on the current year's net income.

Financial Management

- **Fiscal Policies**

- Fiscal policies are critical for organizational capacity and serve to clarify the roles, authority, and responsibilities for essential financial management. Schools are expected to maintain policies and ensure that policies are accessible to public.

Financial Management

- **Required Reporting Submission**

- The financial reports included in this measure are used as a basis for the analysis of a school's financial viability and financial management. The purpose of this measure is to determine whether the school is submitting accurate and timely information to the Institute. Reporting requirements such as financial audits and budget reports are required by state law and the charter contract.

Financial Management

- **Financial Audit**

- Critical to an organization's health and stability is ability to manage its finances. Schools are expected to have an unqualified financial audit. This means that the auditor found the financial statements to be accurate and complete, which is necessary for evaluating a school's financial health.

Policies and Procedures

- Schools are responsible for maintaining their policies and procedures
  - Policies must align with the Institute

- Updated Policies and Procedures must be submitted to the Institute

- Annual review is highly encouraged

- https://erskinecharters.org/institute-fiscal-policies/

Procurement

- Schools must follow the Procurement Policy

- Schools must issue RFP to seek bids

- < $2,500: No competition if price is considered to be reasonable
- $2,500.01 - $20,000.00: 3 quotes from qualified sources
- > $20,000.01: 5 quotes from qualified sources
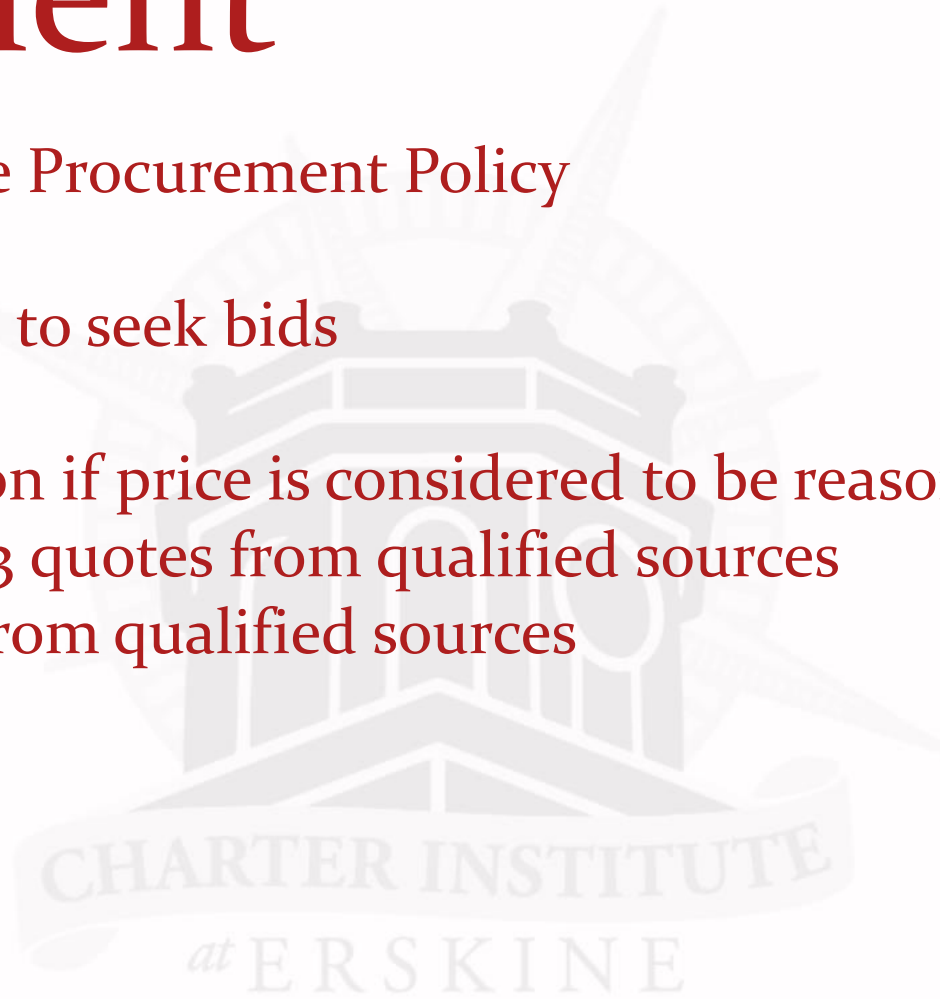
Fund Balance

- Schools are expected to maintain a general reserve fund of at least two month of general fund operation expenditures (16.66% or 60 days of cash)

- For first year schools, the school must maintain a general reserve fund of at least one month of general fund operating expenditures (8.33% or 30 days of cash) by the end of the second school year.

Enrollment Projections

- Schools are expected to meet the enrollment projections as outlined in the Charter Application

- Schools that fail to meet the projection in the charter are expected to seek a charter amendment
  - Enrollment must fall within 10% of the projection

- Failing to meet projection is a charter violation

Best Practices

- School Board is highly encouraged to review financials monthly at Board Meetings

- School is highly encouraged to review the policies and procedures annually

- Prioritize spending that will assist in the goal of "Moving the Needle"

- Be conservative- "Underestimate revenues, overestimate expenses"

FY21 Budget

- FY20 BSC- $2489.00
- FY21 Requested BSC - $2564.00

- 5% Increase in Teacher Salary

- Additional Funding in SRO

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Federal Programs Finance

Ciera Bing
Executive Director of Finance

Time and Effort Reports

- Required for all employees paid with federal programs
- ***MUST*** Remove OMB Circular A-87 reference before receiving signatures
- Semi-Annual Certifications
  - Allowable for employees that are 100% funded by the program
  - Allowable for employees that are completing a job that can be covered 100% by the program
  - Complete twice per year (July-Dec and Jan-June) at the end of each semester
  - If Semi-Annual cert is not completed, then the school ***cannot and will not be reimbursed for payroll expenses***

Time and Effort Reports

- Personnel Activity Report (PARS)
  - ***Must*** be completed by employees that are partially funded by program
  - ***Must*** be completed by employees that are completing a job that can be covered partially by the program
  - Completed monthly and signed by school leader
  - ***Must*** reflect job duties that are associated with program approved plan
  - ***Must be submitted*** with reimbursement documentation
  - If PARS is not completed, then the school ***cannot and will not be reimbursed for payroll expenses***

Required Reimbursement Documentation

Activity:	Prior-Approval Documents in this column are required for expenditure pre-approval.	Reimbursement Documents in this column are required for expenditure reimbursement.

Salary / Benefits	-Segregation of Duties Form
	-Job Description
	-Salary Split
		-Time and Effort (as applicable)
		   -Semi-Annual Certification if 100% from 1 fund
		    -Multiple Cost Objective (with schedule) if paid from
		   more than 1 fund
		-Payroll Register (with signature)
		-General Ledger posting with account number breakdown (***New Requirement)

Contracted Services	-Segregation of Duties Form If under 2,500: -Quote If over 2,500: -Copy of RFP -Proof of posting RFP (ex. Screenshot of website, newspaper ad, etc.) -Copy of 3 received quotes	-Invoice -Copy of signed contract -Proof of payment (ex. Check copy or credit card receipt with bank statement)

Activity:	Prior-Approval Documents in this column are required for expenditure pre-approval.	Reimbursement Documents in this column are required for expenditure reimbursement.
Technology Equipment (ex. Laptop, iPad, etc.)	-Segregation of Duties Form -Leasing agreement (if leasing equipment) *If under 2,500:* -Quote *If over 2,500:* -Copy of RFP -Proof of posting RFP (ex. Screenshot of website, newspaper ad, etc.) -Copy of 3 received quotes	-Invoice -Copy of delivery receipt -Completed Equipment Inventory
Technology **Software**	-Segregation of Duties Form *If under 2,500:* -Quote *If over 2,500:* -Copy of RFP -Proof of posting RFP (ex. Screenshot of website, newspaper ad, etc.) -Copy of 3 received quotes	-Invoice -Proof of payment (ex. Check copy or credit card receipt with bank statement)
PD (Hosting)	Training Pre-Authorization Form *If contracted services under 2,500:* -Quote *If contracted services over 2,500:* -Copy of RFP -Proof of posting RFP (ex. Screenshot of website, newspaper ad, etc.) -Copy of 3 received quotes	-Invoice -Proof of payment (ex. Check copy or credit card receipt with bank statement) -Consultant Agreement/Contract (if applicable) -Agenda from PD -Sign-in from PD

Activity:	Prior-Approval Documents in this column are required for expenditure pre-approval.	Reimbursement Documents in this column are required for expenditure reimbursement.
PD (Attending)	-Travel Pre-Authorization Form	-Agenda -Map -Hotel Receipt -Any other applicable receipts -Travel Reimbursement Form ** Meal receipts do not need to be submitted. (Per diem is calculated based on agenda.)*

**Para-
Professionals**
	-Segregation of Duties Form
	-Job Description
	-Salary Split
	-Highly-Qualified Certification
		-Time and Effort (as applicable)
		    -Semi-Annual Certification if 100% from 1 fund
		    -Multiple Cost Objective (with schedule) if paid from more than 1 fund
		-Payroll Register (with signature)

Supplies	-Signed Purchase Order Request	-Invoice -Proof of payment (ex. Check copy or credit card receipt with bank statement)
Equipment All equipment that is not technology (ex. Tools, tractor, etc.)	-Segregation of Duties Form *If under 2,500:* -Quote *If over 2,500:* -Copy of RFP -Proof of posting RFP (ex. Screenshot of website, newspaper ad, etc.) -Copy of 3 received quotes	-Invoice -Copy of delivery receipt -Completed Equipment Inventory
Travel	-Travel Pre-Authorization Form	-Agenda -Map -Hotel Receipt -Any other applicable receipts -Travel Reimbursement Form ** Meal receipts do not need to be submitted. (Per diem is calculated based on agenda.)*

Activity:	Prior-Approval Documents in this column are required for expenditure pre-approval.	Reimbursement Documents in this column are required for expenditure reimbursement.
Stipends	-Segregation of Duties Form -Stipend Methodology Policy	-Payroll Register (with signature) -General Ledger posting with account number breakdown

Questions and Answers

- Was this effective for your school for FY19?
- Are there any changes you all would like to see?
- Are there any areas where you would like to request **more or less** information?
- Were there any challenges that you encountered when gathering information?

FY19 Concerns/Weaknesses

- Schools not submitting Pre-approval Documentation
- Pre-approvals dated after invoice date
- Documentation not reconciled prior to submitting for reimbursement
  - Salaries and Benefits
    - Inaccurate Payroll Registers
  - Travel reimbursement
    - Per diem rates not followed
    - Final expenses > Pre-approved amounts in plan
  - Contract Agreements
    - Missing proof of work completed based off agreement
  - Missing proof of payments

FY20 Actions

- The Institute Federal Programs Finance Office **_will not_** reconcile school documentation
  - All unreconciled documentation **_will be returned_** to the school
  - School **_will be required_** to resubmit documentation for next claiming period if allowable
- Schools **_must_** submit reimbursement information via SmartFusion
  - Pre-approval information and invoices **_must_** be submitted based off individual approved line item
  - Reference: Federal Programs Finance SmartFusion Webinar

FY20 Final Deadlines

Program	Expenses Incurred	Deadline to Submit for Reimbursement
IDEA, Title I, Title II, CSI, TSI, CATE, Summer Reading Camp	Before or on June 30th	July 15th Close of Business (5pm)
IDEA, Title I, Title II, CSI, TSI, CATE, Summer Reading Camp	July 1st – July 31st	August 10th Close of Business (5pm)
__Monthly reimbursement__ and __quarterly amendment__ deadlines will be set after plans are approved by SCDE. Memo will be sent with all deadlines		
July 15th and August 10th are hard deadlines. **No Exceptions**		

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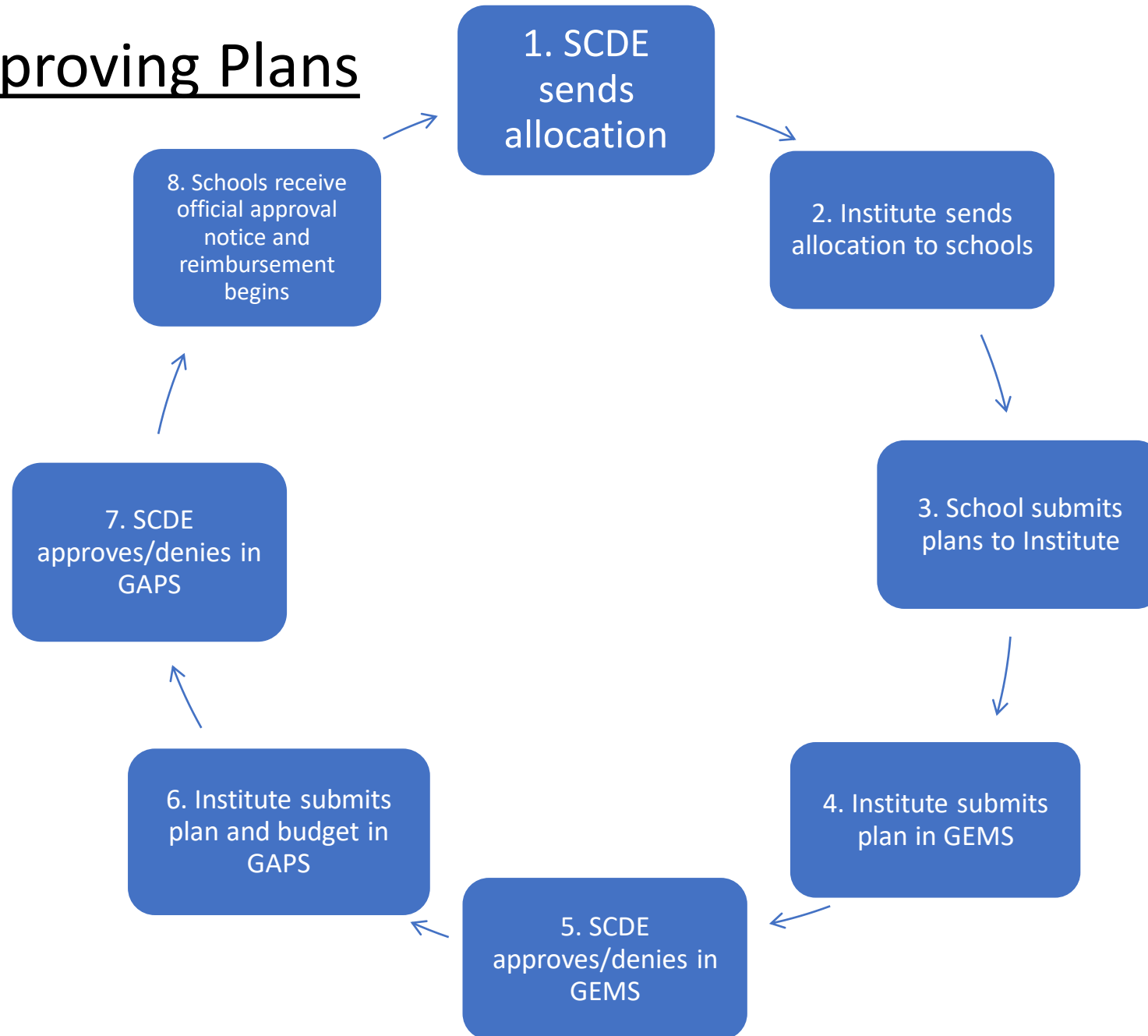at ERSKINE

Time for a Break!!

How are federal funds allocated?

- Title I
  - Per pupil amount based on 5th day count
- Title II
  - Per pupil amount based on 5th day count
- IDEA
  - Per pupil amount based on child count

- Title III & Title IV – spent Institute-wide

Income Forms & 5th Day Count

- The 5th day count is the official data pull that determines eligibility and allocation of Federal funds.

- The 5th day pull must contain all the free and reduced lunch information you have collected to determine your poverty rate.

- All schools should collect lunch forms from students, even virtual schools and schools that do not offer meals. These forms must be updated **annually**.

- Schools must work with their PowerSchool coordinators to ensure all information is entered

Process of Approving Plans

1. SCDE sends allocation

2. Institute sends allocation to schools

3. School submits plans to Institute

4. Institute submits plan in GEMS

5. SCDE approves/denies in GEMS

6. Institute submits plan and budget in GAPS

7. SCDE approves/denies in GAPS

8. Schools receive official approval notice and reimbursement begins

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IDEA

Individuals with Disabilities Education Act

Celina Patton
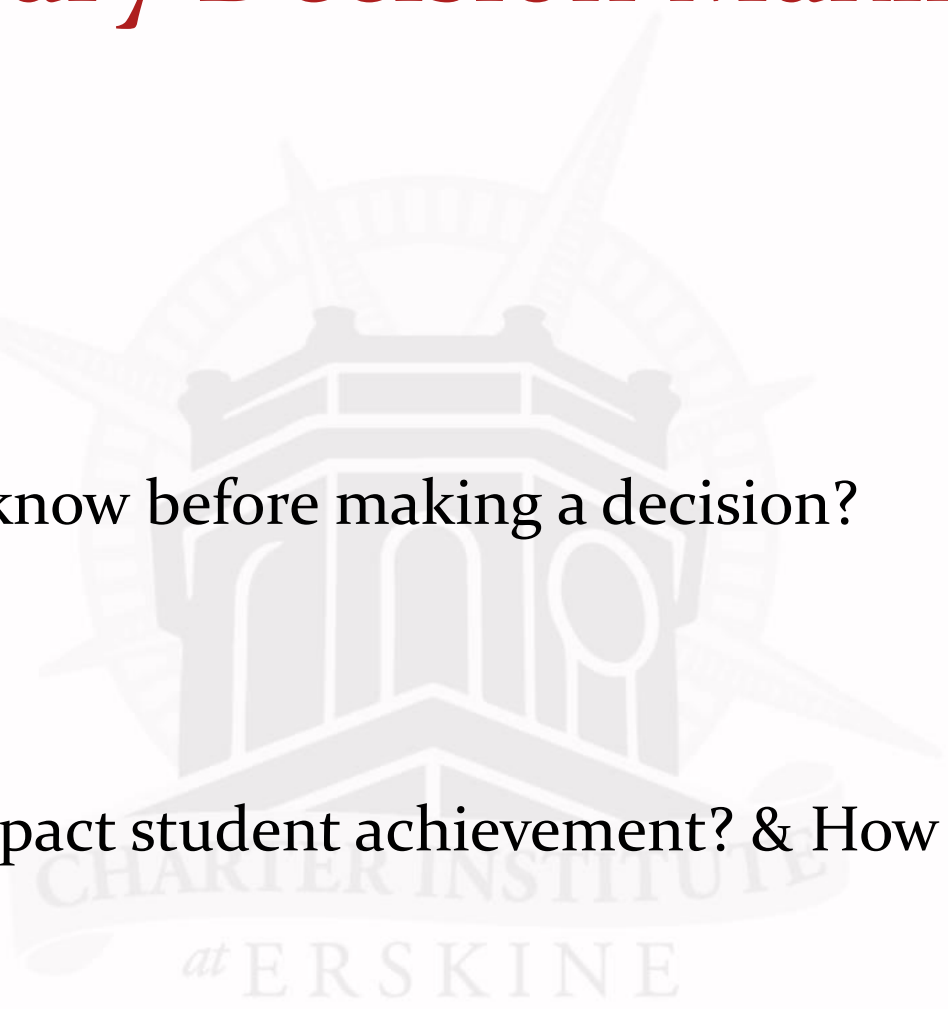Chief of Student Services

SPED Budgetary Decision Making Guide

What does the data tell us?

What more do we need to know before making a decision?

 What expenditures will impact student achievement? & How does IDEA funding impact outcomes?

First Area to Consider: Student Achievement

Data									Guiding Data Dive Questions	Budgetary Considerations
Total minutes of special education instruction delivered per week									• Within this population are there more specific subsets of students that are underserved, i.e. autistic, ED, race, gender, etc.? • What subject is identified as the greatest need – math or reading? • What standards are rated at the lowest level? • Is there a disability category that shows a greater need then the other conditions? • What are the grade levels and age of the students receiving special education services? • What is the grade level and instructional level of the students receiving special education services?	• Consider race and gender and disability area for staff development • Consider which academic area has the largest achievement gap and the staff development needed to close the gap

Name	ELA SS	Dis from SS	Math SS	Dis from SS	Grade	Disability Area	Race	Gender
Student_A	362	0	410	+47	3	AU	B	F
Student B	299	63	253	110	3	AU SP	H	M
Student C	268	94	295	68	3	AU SP	W	F
Student D	326	36	264	99	3	LD	B	M
Student E	221	141	285	78	3	LD	W	M
Student F	260	102	253	110	3	LD	B	M
Student G	332	30	275	88	3	LD	B	M
Student H	395	+33	468	+105	3	LD OHI	W	M
Student I	331	90	414	+7	4	DD SP	B	M

Second Area to Consider: Instruction and Curriculum

	Data	Guiding Data Dive Questions	Budgetary Considerations
Instruction and Curriculum	Type and duration of instruction	• What are the total number of minutes the special education teacher is expected to teach? • What are the number of minutes of "on-grade level" instruction the students are receiving? • What are the number of minutes of "instead of at instructional level" the students are receiving? • Who is delivering this instruction? • How does special education delivered instruction differ from classroom instruction? • Do we have a procedure in place to target instruction to match the student's disability area? • When "targeting" instruction, does the team consider how is the instruction being presented vs. how is it is being differentiated? Or does the team consider the full continuum of services as	• Consider hiring an additional special educator • Consider professional development around standards, grade level rigor and High leverage practices for students with disabilities. • Consider training/professional development for each of the disability areas. • Consider the purchase of support materials or software to help create differenced pathways. • Consider hiring data analysis support or computer support to assist teachers in targeting instruction. • Consider training/professional development around targeting and grouping for instruction. • Consider assessing teacher professional development needs and provide the opportunity to go out to receive the staff development or bring in a consultant to support the teacher's specific needs.

Type and duration of instruction

Name	# minutes of on-grade level instruction	# minutes of at instructional level of teaching	Who delivers instruction?
Student A			
Student B			
Student C			
Student D			
Student E			
Student F			
Student G			
Student H			
Student I			

Instruction and Curriculum (continued)

Schedule Summary

Time	Type – Pull out – PO Push in – PI Co-teaching - CT	# of Students	Subject of instruction
30 min			
1 hr.			
1 hr. 30 min			
2 hrs.			
2 hrs. 30 min			
3 hrs.			
3 hrs. 30 min.			
4 hrs.			
4 hrs. 30 min.			

Accommodations

Name	Reading Classroom	Math Classroom	Standardized Testing Accommodations
Student A			
Student B			
Student C			
Student D			

- How many days has the special educator(s) been granted for special education specific professional development?
- Is there specific professional development that the teacher desires to participate in?
- If you are using computer software to drive or support instruction:
  - What software are you using?
  - What are the number of minutes per week students engage in digital learning?
  - Have you ever evaluated the effectiveness of the software to improve student achievement?
- How are the accommodations currently used effective in providing access to student general education curriculum? What data is used to support the need for the accommodations?
- How are you using data to write IEP goals to close the achievement gap?
- How do you systematically design instruction towards meeting specific learning goals?

- Consider the purchase of reading and math supplementary materials or computer instruction assessments. Staff development in how to make the materials and software most effective is important.
- Consider technology to support the student disability areas.
- Consider the purchase of progress monitoring tools that are evidence based (i.e. National Center on Intensive Intervention)
- Consider professional development on matching student data to attainable IEP goals, providing accommodations that meet the individual student needs

Third Area to Consider: Capacity Building

Capacity Building

Teacher Caseload –
Total minutes of instruction per week

Capacity Building Feedback
5 - totally confident to deliver instruction
4 – confident to deliver
3 – capable of deliver
2 – have some reservations to deliver
1 – unsure

Criteria	Administrator rating	Teacher rating
Special Education Dept. ability to handle current caseload		
Ability to differentiate instruction for all disability areas		
Knows the grade level standards for all of the grade levels served		
Ability to deliver specific and targeted support for all children in math		
Ability to deliver specific and targeted support for all children in reading		

Special Education Training and Professional Development (last three years)

Date	Title or type of staff development or training

- What are the total number of minutes the special education teacher is expected to teach?
- Looking at special education teacher caseloads, can the teacher(s) actually deliver the instruction required?
- What are the qualifications, certifications and specialty expertise of your teacher(s)?
- What training or professional development has your special education teacher(s) received to deal with the specific range of handicapping conditions the teacher serves?
- What training or professional development has your special educators received to deliver effective reading and math instruction?
- Are you using para-professionals to deliver or support instruction?
- What is their education level and training?
- How do you deliver professional development to para-professionals

- Conduct time task analysis to ensure that the program has enough teachers to effectively deliver instruction
- Consider replacing ineffective and underqualified staff with qualified teachers.
- Determine special educator's professional development needs and either send teachers to the sites or bring a consultant in to improve the effectiveness of the teachers. Make the training very specific in order to address the needs of the teachers.
- Consider hiring an on-site special educator coach to mentor and monitor instruction.
- Ensure that any adult that work directly with children has received adequate training and support.

Fourth Area to Consider: Procedural

Procedural						

Special education teachers planning and preparation time

	Monday	Tuesday	Wednesday	Thursday	Friday
Minutes					

Special education/classroom teacher collaboration time

	Monday	Tuesday	Wednesday	Thursday	Friday
Minutes					
Grade level(s)					

- When scheduling special education services for your students, what are the top three considerations?
- (Special education teacher response only) - What should be the top three priorities when designing the special education instruction schedule?
- In minutes, how much pull-out instruction, do your most impacted students receive?
- In minutes, how many minutes of reading and-or math will the highly impacted students miss?
- Does the schedule allow the students to receive small group instruction with the classroom and with the special educator (double dip)?
- Does the schedule allow the special educator adequate planning and preparation time?
- Are special educators given adequate and specific time to meet with the classroom teachers?
- How receptive are the classroom teachers to following up on the IEP, accommodation, and recommendations of the special educator?

- Develop clear priorities for determining the allocation and placement of special education services
- Consider redoing the scheduling to better serve the students. Mark a quarterly time to see if the caseload is reasonable as students are added or deleted from special education services.
- Consider hiring an additional special educator to handle expanded caseloads.
- If planning and preparation time cannot be adequately supported by the current schedule – consider:
  - Hiring para-professionals to cover classroom or special educator's duties (cafeteria or recess) so that there is a specific and honored planning and collaboration time.
  - Teacher paid – planning and collaboration time.
- Consider regular time for the special educator(s) to work with classroom teachers or hiring an outside consultant

Questions....

Pulse Check....Our Progress in SPED

The Institute SPED Program Stands Today...

- Waiting Feedback from SCDE for Transition Audit/ Indicator 13

- Special Education Data Meetings (In Progress)

- Final Verification of Child Count

- School Visits
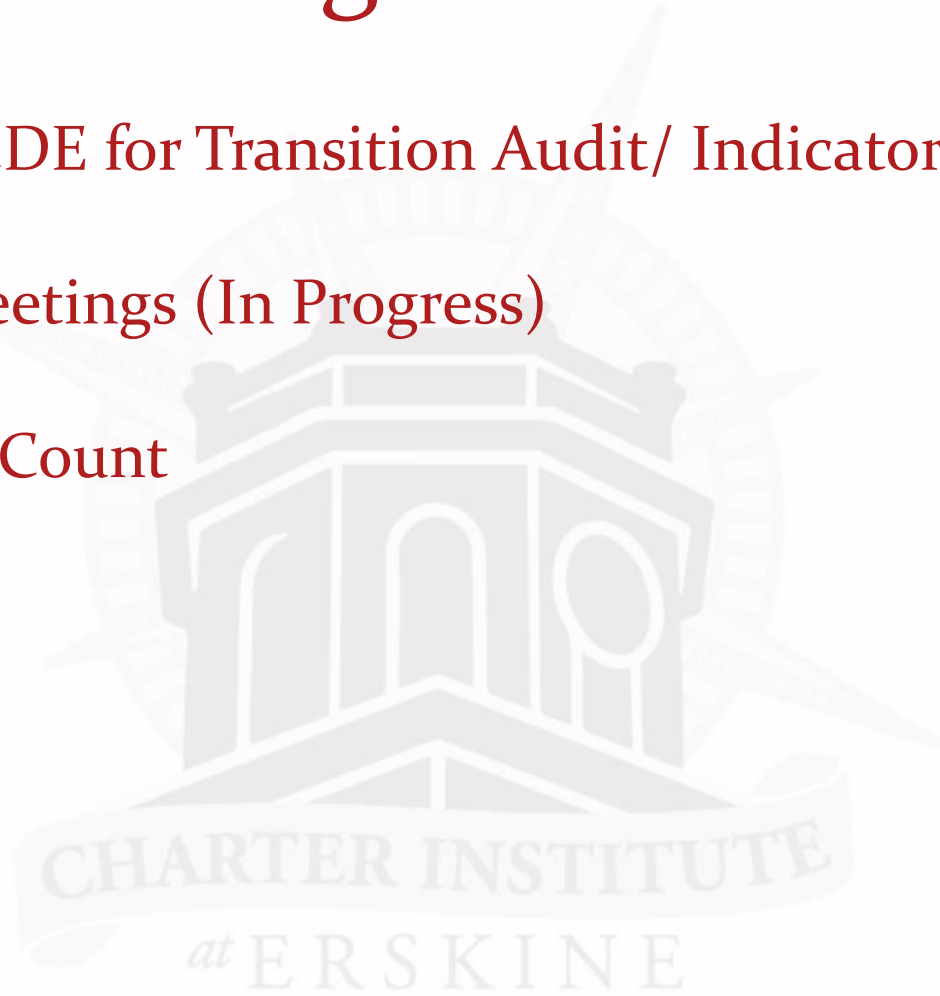
Big Picture: Moving Forward....

- Shared Service Models for 2020-21
  - MTSS & School Psychologist

- Annual Review of Compliance (ARC)—Reduction of Paperwork

- Showcase Schools for 19-20

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Parent Right to Know

- At the beginning of each school year, a school that receives funds under this part shall notify the parents of each student attending any school receiving funds under this part that the parents may request, and the school will provide the parents on request (and in a timely manner), information regarding the professional qualifications of the student's classroom teacher.
  - Distribute Parent Right to Know letter to parents
  - Document any Right to Know requests from parents

Parent Right to Know

- Must notify parents that they may request the following information regarding their child's teacher:
  - Whether the teacher has met the SC certification requirements for the grade level and subject area in which the teacher provides instruction
  - Whether the teacher is teaching under an emergency or other provisional status through which SC qualifications or certification criteria have been waived
  - The college major and any graduate certification or degree held by the teacher
  - Whether the student is provided services by paraprofessionals, and if so, their qualifications

Parent Right to Know

- A sample/template is provided.

Right to Know Professional Qualifications of Teachers and Paraprofessionals

Date: [Insert Month/Day/Year]

Dear Parents,

In compliance with the requirements of the Every Students Succeeds Act, the [School Name] would like to inform you that you may request information about the professional qualifications of your student's teacher(s) and/ or paraprofessional(s). The following information may be requested:

- Whether the student's teacher—
  - has met State qualification and licensing criteria for the grade levels and subject areas in which the teacher provides instruction;
  - is teaching under emergency or other provisional status through which State qualification or licensing criteria have been waived; and
  - the college major and any graduate certification or degree held by the teacher.
- Whether the student is provided services by paraprofessionals and, if so, their qualifications.

If you wish to request information concerning your child's teacher's and/ or paraprofessional's qualifications, some of this information is accessible through the South Carolina Department of Education's (SCDE) Educator Qualification Search, https://ed.sc.gov/policy/federal-education-programs/esea-title-ii-part-a1/parents-right-to-know-requirement/educator-qualification-search/

You may search for this information by entering the teacher's name directly or by accessing a listing of all teachers by district or school name. Only teachers currently employed in South Carolina's school districts are included in this listing. Information obtained through the Teacher Qualification Search Website is intended for informational use only and is not an official record.

If parents do not have access to the Internet or wish to receive additional information, please contact [Insert Title of Principal or Designee], at [Insert phone number]. The information will be provided to you within a reasonable period of time, normally within three weeks of receiving your request.

Sincerely,

Insert Signature

[Insert Printed Name]

[Insert Principal/Designee Title]

Parent Right to Know

- Schools must notify parents in a format that is understandable and in a medium that will reach all parents (if possible, provide in a language the parents will understand)
- Ensure the notification includes the principal's contact information, the school name, and the date of notification.

Title II Allowability

- The purpose of the Title II, Part A grant is:
  - to increase student achievement consistent with challenging State academic standards,
  - to improve the quality and effectiveness of teachers, principals and other school leaders,
  - to increase the number of teachers, principals and other school leaders who are effective in improving student academic achievement in schools, and
  - to provide low-income and minority student greater access to effective teachers, principals and other school leaders.

Title II Allowability

- Initiatives to recruit and retain highly effective teachers
- Professional development to increase teacher knowledge and improve instruction in the classroom
- Professional development to improve the quality of instructional leadership teams, principals, and other school leaders
- Multiple career paths
- Teacher advancement initiatives

Title II Non-Allowable Expenses

- Food
- General substitute teachers
- Instructional materials
- Evaluator training
- MAP testing and other benchmark testing
- Technology/equipment
- Recruitment giveaways with logo

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Title III

English Language Learners

Celina Patton
Chief of Student Services

Title III Funding

Cohort for English for Speakers of Other Languages (ESOL)

- Offered through the College of Charleston
- 18 Hours of Masters Level Courses (1/2 a World Languages Masters Degree)
- Upon Successful Completion of all classes, teachers will be able to add on ESOL certification to teaching certificate
- Begins January 2020

Pulse Check...Title III progress

Title III Site Visits: HLS

Home Language Survey

- The home language survey must be on file for all students.
  - This form must be signed and dated by the parent or guardian.
  - It must be kept in the student's permanent file.
- There are 2 ways to collect this information to have on file:

This will be the typical way the form is collected.

Collect original form from previous school:	Parent/Guardian completes new form ONLY IF:
• Collect original form from previous district/school that student is transferring from.	• Kindergarten student • Student is new to the country • Student comes from a private/Christian school

- ONLY completed once at initial enrollment for student

- Records Request, should show efforts of attempts to receive original

- ONLY state approved HLS should be used

- Recommendation: Remove HLS from your enrollment packets

Title III Site Visits: HLS

For School Use Only:

School personnel who administered and explained the HLS and the placement of a student into an English language development program if a language other than English was indicated

Name: _____ Date: _____

Who is signing this when a student is initialing enrolling AND did they ensure they followed proper procedures?

Title III: Site Visits

- Does your front office staff have a procedure in place to request records for transfer in of ESOL students (who, what, when)

- Does your front office staff and administrators both know and/or follow the procedures for student enrollment forms so that ESOL students are identified upon enrollment? (even IF no EL students have enrolled)

- Does the school assess the students English Language proficiency within the appropriate timelines? (30 days, 10 days)

- Does the school appropriately code ESOL students in PowerSchool? Does your school level documentation reflect accurate coding?

Website Assistance

TITLE III
PROFESSIONAL DEVELOPMENT

2019

2019-20 EL Coordinators Training Calendar

Title III Coordinators Training August 2019 Recorded
Webinar

September 2019 Monthly Coordinator Meeting

October 2019 Monthly Coordinator Meeting

November 2019 Monthly Coordinator Meeting

2. **Guiding Principles: English Speakers of Other Languages**

TITLE III/ESOL GUIDE FOR COMPLYING WITH FEDERAL, STATE AND INSTITUTE GUIDELINES

Parent Preferred Communication Method	Exit Requirements and Monitoring
Notification to Parents Commitment to All LEP Students	Student Waiver Guidance
Communicating with Limited English Proficient Parents	Student Waiver Letter-Spanish (sample use Enrich forms)
Exiting Students from ESOL Support Services	ESOL Program Evaluation
USDE EL Toolkit	DCL EL Parent Fact Sheet
19-20 SCDE English Learner Guiding Principals	

Accommodations

Proficiency Codes for
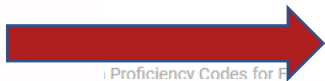
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CTE

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Title I

Haley Perez
Director of Federal Programs

Ashley Sturkie
Fiscal Coordinator

SCDE Feedback

"They did an exemplary job. Their understanding of Title I law, regulations and guidance is very well informed. They are also very adept with the use of technology to run the district and to assist schools in being compliant and putting together robust Title I plans. Their attitude is one of cooperation and striving to do the right thing. They will be put on the schedule for a full Title I audit for 2019-2020.

We were very encouraged to see the commitment, attention to detail and positive attitude that this district exhibited to us."

Principal Attestation Letter

- The Principal Attestation Letter must be signed by the principal.

- The letter must be on file at the school.

- The principal must submit an attachment outlining the details if any teachers or paraprofessionals do not meet the requirements of the letter

  - A template is provided.

**Principal's Attestation
Regarding Teachers and Paraprofessionals
For Title I, Part A**

School Name:_____

I attest, as principal of the above named school, that the following is true:

- All teachers teaching in a program supported with Title I funds are properly certified for their teaching assignment as required by the South Carolina Department of Education (SCDE) Required Credentials regulation.
- All paraprofessionals working in a program supported with Title I funds shall have:
    - completed at least 2 years of study at an institution of higher education;
    - obtained an associate's (or higher) degree; or
    - met a rigorous standard of quality and can demonstrate, through a formal State or local academic assessment knowledge of, and the ability to assist in instructing, reading, writing and mathematics; or knowledge of, and the ability to assist in instructing, reading readiness, writing readiness and mathematics readiness, as appropriate
    - a secondary school diploma (or its recognized equivalent)

Any teachers or paraprofessionals who do not meet the above requirements are listed in an attachment to this page along with details regarding the process or program to rectify their situation.

Signed:_____

Name and title:_____
(printed)

Date:_____

20 Day Letter

- Title I schools are required to notify parents of children when their child is assigned or taught for 20 or more consecutive days by a teacher who is not properly certified for the teaching assignment.

Highly Effective Teachers and Paraprofessionals

- Teachers in Title I schools must be "highly effective" (certified)
- 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:

Planning Meeting

- The purpose of the planning meeting is to plan and develop the school Title I plan based on the needs of the school. The school must consider strategies to close the achievement gaps within the school.

- The planning meeting must be held prior to submission of the Title I plan.

- The school must select a diverse school planning team consisting of staff, administrators, parents, community members, and students at the high school level.

Planning Meeting Preparation

- The school must have a meeting notice to share with parents and stakeholders to invite them to participate in the meeting.

- A diverse school planning team must be invited. (This must consist of staff, administrators, parents, community members, students (at high school level).

- The school must send out the draft Parent and Family Engagement Policy and draft School-Parent Compact prior to the Planning Meeting to request feedback.
    - Any feedback collected will be used during the Planning Meeting for revising the documents.

- The school must have a written procedure for processing parent suggestions shared at the meeting.

Planning Meeting Agenda

- Evaluation of previous year's parent involvement program and activities
- Planning of future parent involvement program and activities
- Review and revision of Parent and Family Engagement Policy
- Review and revision of School-Parent Compact
- Review of previous year's Title I plan and Annual Evaluation
- Discussion of Comprehensive Needs Assessment to identify and prioritize needs
- Planning of current year Title I plan and implementation

Required Planning Meeting Documentation

- Meeting announcements/notices
- Agenda
- Sign-in sheets with role
- Minutes
- Written procedure for processing parent suggestions

Planning Meeting

Planning Meeting Checklist

Title I schools are required to retain documentation which shows that parents of children receiving services under Title I were involved in the decisions regarding how the funds would be used. The school must also develop jointly with, and agreed upon with, and distribute to parents a written parent involvement policy and school-parent compact. A Planning Meeting must be held prior to the Title I plan being approved. Please use the checklist below to be sure your school meets all requirements for the upcoming planning meeting.

REQUIRED Items for Planning Meeting	Yes	No
Do you have a meeting notice to share with parents and stakeholders to invite them to participate in the meeting?	☐	☐
Did you select a diverse school planning team to invite? (This must consist of staff, administrators, parents, community members, students (at high school level).	☐	☐
Do you have a sign-in sheet so that all meeting attendees can sign in?	☐	☐
Have you assigned someone to take minutes during the meeting?	☐	☐
Does your agenda have all of the below items included- 1. Evaluation of previous year's parent involvement program and activities* 2. Planning of future parent involvement program and activities 3. Review and revision of Parent and Family Engagement Policy 4. Review and revision of School-Parent Compact 5. Review of previous year's Title I plan and Annual Evaluation* 6. Discussion of Comprehensive Needs Assessment to identify and prioritize needs 7. Revision of current year Title I plan and implementation *Only for schools that were Title I in prior year	☐	☐
Did you share the original/draft Parent and Family Engagement Policy with stakeholders prior to the meeting and collect feedback to discuss potential revisions during the meeting?	☐	☐
Did you share the original/draft School-Parent Compact with stakeholders prior to the meeting and collect feedback to discuss potential revisions during the meeting?	☐	☐
Do you have copies of the original/draft Parent and Family Engagement Policy to share with meeting attendees when the team discusses potential revisions during the meeting?	☐	☐
Do you have copies of the original/draft School-Parent Compact to share with meeting attendees when the team discusses potential revisions during the meeting?	☐	☐
Are meetings related to Title I being scheduled to offer various times/days to increase involvement?	☐	☐
Do you have a written procedure for processing parent suggestions received during or after the meeting?	☐	☐

I certify that I have reviewed all of the above compliance requirements for the school's Title I planning meeting.

_____   _____

Title I School Coordinator   Date

Planning Meeting

Title I Annual Meeting and Planning Meeting Differences

Title I Planning Meeting:

The school should select a school planning teams consisting of the following members:

- School staff,
- Administrators,
- Parents,
- Community members,
- Technical assistance providers,
- and, at the high school level, students.

The team will meet before the end of school year plan to develop their school Title I Plan based on the needs of the schools. The school should consider strategies that could close the achievement gaps at the school.

Title I Annual Meeting:

One requirement of the Elementary and Secondary Education Act (ESEA) is the Title I Annual Parent Meeting. Each year, schools receiving Title I, Part A funds are required to host a meeting for parents to explain the Title I program and how parents can be involved. At this meeting, the following issues must be addressed:

- Explain whether the school participates in a schoolwide or targeted assistance program.
- Explain the requirements of a schoolwide or targeted assistance program.
- Explain what participation in Title I means for the school and include-
  - A description and explanation of the school's curriculum.
  - Information on the forms of academic assessment used to measure student progress.
  - Information on the proficiency levels students are expected to meet.
- Explain the district Parental Involvement Policy, the school Parental Involvement Policy, and the school School-Parent Compact. (Note that each Title I school must have a **site specific** Parental Involvement Policy and School-Parent Compact. This is not the same as the district Parental Involvement Policy.)
- Explain the rights of parents to be involved in the school's programs and provide ways to do so.
- Explain that parents have the right to request opportunities for regular meetings for parents to formulate suggestions and to participate, as appropriate, in decisions about the education of their children.

In order to keep parents informed, schools must invite to this meeting all parents of children participating in Title I, Part A programs. In a schoolwide school, all parents would be invited to attend, and in a targeted assistance school, parents of children receiving Title I services would be invited. Schools must also offer a flexible number of additional meetings, such as in the morning or evening so that as many parents as possible can attend.

Annual Meeting

- In order to keep parents informed, schools must invite to this meeting all parents of children in a Title I school. In a school-wide school, all parents would be invited to attend, and in a targeted assistance school, parents of children receiving Title I services would be invited.

Annual Meeting Agenda

- The school's participation in Title I
- The requirements of Title I
- The parents' right to be involved in their child's education
- Parent and Family Engagement Policy
- School-Parent Compact
- Title I Plan
- A description and explanation of the school's curriculum
- Information on the forms of academic assessment used to measure student progress
- Information on the proficiency levels students are expected to meet

Required Annual Meeting Documentation

- Meeting announcements/notices
- Agenda
- Sign-in sheets with role
- Minutes
- Written procedure for processing parent suggestions

Annual Meeting

Title I Annual Meeting and Planning Meeting Differences

Title I Planning Meeting:

The school should select a school planning teams consisting of the following members:

- School staff,
- Administrators,
- Parents,
- Community members,
- Technical assistance providers,
- and, at the high school level, students.

The team will meet before the end of school year plan to develop their school Title I Plan based on the needs of the schools. The school should consider strategies that could close the achievement gaps at the school.

Title I Annual Meeting:

One requirement of the Elementary and Secondary Education Act (ESEA) is the Title I Annual Parent Meeting. Each year, schools receiving Title I, Part A funds are required to host a meeting for parents to explain the Title I program and how parents can be involved. At this meeting, the following issues must be addressed:

- Explain whether the school participates in a schoolwide or targeted assistance program.
- Explain the requirements of a schoolwide or targeted assistance program.
- Explain what participation in Title I means for the school and include-
  - A description and explanation of the school's curriculum.
  - Information on the forms of academic assessment used to measure student progress.
  - Information on the proficiency levels students are expected to meet.
- Explain the district Parental Involvement Policy, the school Parental Involvement Policy, and the school School-Parent Compact. (Note that each Title I school must have a **site specific** Parental Involvement Policy and School-Parent Compact. This is not the same as the district Parental Involvement Policy.)
- Explain the rights of parents to be involved in the school's programs and provide ways to do so.
- Explain that parents have the right to request opportunities for regular meetings for parents to formulate suggestions and to participate, as appropriate, in decisions about the education of their children.

In order to keep parents informed, schools must invite to this meeting all parents of children participating in Title I, Part A programs. In a schoolwide school, all parents would be invited to attend, and in a targeted assistance school, parents of children receiving Title I services would be invited. Schools must also offer a flexible number of additional meetings, such as in the morning or evening so that as many parents as possible can attend.

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

- Late plan submission

- Comprehensive Needs Assessment lacks detail

- Expenditure activities do not tie back to Needs Assessment

- Expenditure activities are written with limited detail

- Expenditure not tied to increasing student achievement

- Job descriptions and schedule do not match activity

- Issues with personnel on website vs. Power School vs. PCS

Weak	Better
Provide professional development on Smart Technology and Study Island.	Provide professional development to teachers in an effort to improve academic performance in all subjects for students in grades K-7. Staff development will include MAP training, SMART board training, and collaborative planning. (7 days of training @ 1000 per day.)
Provide professional development to support Schoolwide academic programs by attending conferences and workshops.	Provide professional development for Principal and Curriculum Specialist to support Schoolwide academic programs by attending The Summer Leadership Institute (June 21-25, 2014). Expenditures may include lodging, registration, mileage, and meals.
Provide Professional Development for Title I schools only.	Provide Math Professional Development for Title I Schools only. The intense, small group and one-on-one assistance to all Title I math teachers will be conducted by Patty Smith. The training is tailored to the schools' and teachers' weaknesses as evidenced by SC Ready scores. Training will encourage more hands-on math activities. (Rate averages $1000 per day for 18 days. 10 days of training during in-service and 8 days of training during the school year. $110 for additional individual training session.)
Provide instructional materials in ELA/math for grades 6-8.	Provide instructional materials in ELA/math to support classroom instruction and small group instruction in grades 6-8. Expenditures may include classroom book sets at a rate of $500 per set for 50 teachers, math kits @ $475 each for 15 teachers, charts, paper, posters, tape, glue, staples, notebooks, timers, rulers, $300 for additional ELA/math manipulatives for 50 teachers, etc. Additional items may include 50 print cartridges at a rate of $30 each.

Provide clear description.
Remember to include the WHO, WHAT, WHEN and HOW. Justify your cost for the activity.

Distribution of Title I Plan

- The school must submit written proof that the school Title I plan has been shared with parents.

- The school must also have a written procedure for processing parent suggestions related to the Title I Plan, as parents must be given the opportunity to provide comments on the plan if they feel it to be unsatisfactory.

How do I involve parents and family members in our school?

- Families are more likely to become involved when they
  - Understand that they should be involved
  - Feel capable of making a contribution
  - Feel invited by the school

Parent and Family Engagement Policy

- Schools that receive Title I, Part A funds must develop jointly with the parents of children participating in Title I services a written parent and family engagement policy that describes how the school will carry out the parent and family engagement requirements set forth in ESSA (section 116 (a)(2).

- The policy must be reviewed annually and revised as needed.
  - Original parent involvement policy should be distributed to request input (note date)
  - Re-distribute to parents once policy has been revised (note date)

Parent and Family Engagement Policy

Title I School Parent & Family Engagement Policy Self-Checklist

LEA Name: _____   School Name: _____

Each school that receives Title I funds is required to develop a written parent and family engagement policy that describes the means for carrying out the requirements of Section 1116 of the Every Student Succeeds Act (ESSA). The School must ensure that information related to school, parent and family engagement programs, meetings, and other activities are sent to the parents and families of Title I children in a format and in a language the parents can understand.

The policy must be

- Developed jointly with and agreed upon 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
Policy Involvement		
1) The Policy describes how parents will be involved in an ongoing and timely way in the planning, review, and improvement of the school's Parent and Family Engagement 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 will provide parents of participating children with timely information about the Title I program.		
8) 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 achievement levels of the challenging State academic standards.		
9) 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 will respond to any such suggestions within a designated time frame.		

School Parent Compact

- The school-parent compact is a written agreement between teachers and parents. It is a document that clarifies what families and schools can do to help children reach high academic standards. Every school receiving Title I funds must develop a compact.

- The compact must be reviewed annually and revised as needed.
  - Original compact should be distributed to request input (note date)
  - Re-distribute to parents once compact has been revised (note date)

School Parent Compact

- Must include
  - Parent-teacher conferences
  - Frequent reports to parents on their child's progress
  - Reasonable access to staff
  - Opportunities to volunteer
  - Two-way, meaningful communication in a language that family members can understand

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's 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**_____

Parent Involvement Activities

- At the end of each school year, Title I schools are required to submit a list of all parent and family engagement events that were held throughout the school year.

- The school should retain a copy of all announcements, sign-in sheets, agendas, minutes, etc. for these events throughout the year.

Annual Evaluation

- At the end of each school year, Title I schools are required to evaluate the effectiveness of the Title I program.

- The school must determine whether the 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.

- The school must use this evaluation to revise the plan, as necessary, based on the results of the evaluation to ensure continuous improvement of students.

Keep in mind…

- Comprehensive Needs Assessment
  - All federal funds must tie back to this data.
- Pre-Approval & Reimbursement Documents
  - Pre-approval documents should be submitted *prior* to the expense. Reimbursement documents should be submitted *after* the expense.
- Submission Deadlines are final.
- Title I Coordinators do not have to be the school leader
- Document all meetings related to federal funds.

- We only ask what is required of you.

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