

Overview of Title I Budgets and Plans: How the Two Work Hand and Hand

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Georgia Department of Education

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SCHOOL IMPROVEMENT & DISTRICT EFFECTIVENESS



Purpose

This session is designed particularly for Title I directors and principals of Title I schools. To develop effective internal controls, participants will receive an overview of the Title I plan and budgeting process and gain insight on how to use Title I plan in developing their Title I budgets. The session will also share the use of Google Drive in developing budget templates. The session will also focus on a method to successfully implement and monitor a Title I, Part A budget.

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Topics to be Covered

- Federal regulations regarding budgets
- Overview of Needs Assessment
- Overview of Title I Plans (Schoolwide and Targeted Assistance)
- Planning your District Set-Asides (8010)
- Building your Title I budget from the Title I Plan
- Using Google Drive to create budget templates
- Advantages



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What is Internal Control?

A Non-Technical Definition:

An intentional practice or procedure, prescribed by management, designed to eliminate or minimize organizational errors and fraud.

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What is Internal Control?

The Uniform Grants Guidance Definition:

- Title 2: Grants and Agreements
[PART 200—UNIFORM ADMINISTRATIVE REQUIREMENTS, COST PRINCIPLES, AND AUDIT REQUIREMENTS FOR FEDERAL AWARDS](#)
[Subpart A—Acronyms and Definitions](#)

What is Internal Control?

§200.61 Internal controls.

- *Internal controls* means a process, implemented by a non-federal entity, designed to provide reasonable assurance regarding the achievement of objectives in the following categories:
 - (a) Effectiveness and efficiency of operations;
 - (b) Reliability of reporting for internal and external use; and
 - (c) Compliance with applicable laws and regulations.



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Internal Control Principles

- It is a process
- It is established, maintained, and monitored by people at all levels
- It must be cost effective
- It is the responsibility of all employees involved in the process

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Need for Internal Control

- Achieve goals and objectives
- Safeguard assets
- Ensure accuracy and reliability of data
- Promote operational efficiency
- Compliance with laws and regulations

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Purpose of Title I

The purpose of Title I funds is to enable schools to provide opportunities for at-risk and disadvantaged children to acquire the knowledge and skills contained in the challenging state content standards and to meet the challenging state performance standards developed for all children.

Title I Program Models

Targeted Assistance

- Eligible Students
- Targeted Resources

Schoolwide

- Needs Assessment
- Schoolwide Plan

Title I Targeted Assistance

Schools that are ineligible for a schoolwide program (Section 1114)

- Less than 40 percent poverty
- Less than the district poverty average

Targeted Assistance requirements

- Rank list students using multiple academic criteria
- Limit the expenditures only to identified students
(activities, teachers, parent)



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Title I Targeted Assistance

Services may be delivered in a number of ways such as:

- In-class instruction
- Pull-out model
- Extended day

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Title I Targeted Assistance

Targeted Assistance program must be based on:

- Improving achievement of participating children
- Using effective instructional strategies that give primary consideration to extended-time strategies
- Providing instruction by highly qualified and trained professional staff
- Implement strategies to increase parent engagement in the education of their children.



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Title I Schoolwide

Schoolwide Program Model

Section 1114 of Title I of the ESEA allows a school in which 40 percent or more of its students are from low-income families to use its Title I funds, along with other federal, state, and local funds, to operate a schoolwide program to upgrade the entire educational program in the school to improve the academic performance of all students, particularly the lowest-achieving students. [Section 1114(a)(1)]

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Title I Schoolwide

Schoolwide Programs:

- May upgrade the educational system of the entire school by consolidating federal funds into one account
- Use all funds to implement the school's school improvement plan
- Build budgets to reflect the Title I Schoolwide Plan (consider referencing Schoolwide Plan in budget)
- Limit their Title I expenditures strictly to those costs appropriate for Title I use of funds.

Title I Schoolwide

The primary design of the Schoolwide Plan must address the following:

- Conduct a comprehensive needs assessment
- Develop and implement the schoolwide plan (ten required components)
- Annually evaluate the plan to ensure that students demonstrate academic achievement and modify the plan based on this data

Title I Budget Process

Plan and Budget the Set-Asides: Required Set- Asides

- 1% for parental involvement if system allocation is \$500,000 or more
- 5% for Flexible Learning Programs (FLP) for all Priority and Focus Schools in the district
- NCLB Choice Transportation
- 5% for Professional Learning set-aside for highly-qualified required PL
- Services for homeless students in non-Title I schools
- Services for students in private schools
- Services for students in programs for Neglected and Delinquent.
- All carryovers from prior year (Parental Involvement, FLP, and Private School participation)

Title I Budget Process

Plan and Budget the Set-Asides: Optional Set-Asides

- Administrative
- Indirect Costs
- Summer School and/or Before/After School
- Professional Learning (Districtwide)
- Additional FLP
- Pre-school Programs



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Building Templates – Step I

Creating Excel Spreadsheet showing Set-Asides

Creating Excel Spreadsheet showing School
Allocations

(Handouts)

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Set-Aside Template Sample

Sample School District
FY15 Title I, Part A - Set Asides and School Allocation Worksheet

Revised 12-18-14
Revised 10-2-14
Adopted 8-5-14

	Initial Allocation	Additional Allocation														
Allocation for FY15	1,369,386															
Additional Allocation (Date)																
Carryover FY14 (Dec.)		45,260							2,300							
FY14 Allocation	1,369,386			580	610	611	642	810	880	530	300	612	615/616			
Total FY15 Allocation		1,414,646	Total Salary	Travel	supplies	Tech. Supplies	books	registra.	Audit	Stamps	Contracted Services	Software	Expend. Equip.	Total		% of Total Allocation (1476649)
SET ASIDES																
Administrative	174,450	(1,594)	162,451	4,518	1,200	1,122	1,200	975		555		300	535	172,856		0.122
PD for HQT														-		0.000
Professional Development	83,070	5,291	83,924	1,462	300	450		525					1,700	88,361		0.062
1% Parent Involvement	13,694	1,814												15,508		0.011
FLP Allocation - PCHS	68,470	-	27,900		23,469					2,450		7,525	7,126	68,470		0.047
Public School Choice														-		0.000
Homeless	-	218			218									218		0.000
Audit Costs	1,800	-							1,800					1,800		0.001
Indirect Cost	33,399	-							33,399					33,399		0.024
District Summer School		894	894											894		0.001
District Parent Invol. Coord.	29,937	632	28,208	1,415	386	230		330						30,569		0.022
Prof. Dev. Carryover FY14														-		0.000
FY14 1% Parent Involv. Carryover														-		0.000
TOTAL SET ASIDE	404,820	7,255	303,377	7,395	25,573	1,802	1,200	1,830	35,199	3,005	0	7,825	9,361	412,075		0.291
Carryover FY14 to Schools		38,005												38,005		0.027
TOTAL SCHOOL ALLOCATION	964,566													1,002,571		0.709

Allocation Template Sample



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SCHOOL & DESIGNATION	Grade Span	FTE2014 - 1 Enrollment Minus Pre-K (10/1/13)	# Poverty Minus	% Poverty	PPA	"CEP" Yes or No	School Allocation	School Carryover	State Carryover (Jan. 2014)	Total School Allocation	1% Parent Involvement (Set-Aside)		2014% Carryover (Dec. 2014)	TOTAL% Parent Involvement (Set-Aside)	Title I Paid Salaries
Middle School A - ALERT	'6-8'	534	534	100.00	392	YES	\$209,328	\$118		\$209,446	\$2,282	SWP	\$ 17	\$ 2,299	133610
Middle School B - NONE	'6-8'	412	198	48.06	275	NO	\$54,450	\$1,825		\$56,275	\$2,283	SWP	\$ 602	\$ 2,885	23568
High School - PRIORITY	'9-12'	1025	633	61.76	224	NO	\$141,792	\$10,754		\$152,546	\$2,282	SWP	\$ -	\$ 2,282	108176
Elem. School A - NONE	'K-5'	641	641	100.00	376	YES	\$241,016	\$4,151		\$245,167	\$2,282	SWP	\$ 478	\$ 2,760	186294
Elem. School B - NONE	PreK-5'	516	516	100.00	305	YES	\$157,380	\$20,767		\$178,147	\$2,282	SWP	\$ 599	\$ 2,881	137629
Elem. School C - NONE	PreK-5'	616	584	94.81	275	YES	\$160,600	\$390		\$160,990	\$2,283	SWP	\$ 118	\$ 2,401	98866
BOE SET-ASIDES															303377
TOTALS		3744	3106				\$964,566	\$38,005	\$0	\$1,002,571	\$13,694		\$ 1,814	\$15,508	\$ 991,520

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Building Templates – Step 2

Creating Google Drive Budget Templates

- Set-Asides
- School Level Budget
- View Sample Templates – See Handouts
- Go to Google Drive live Documents

Assigning Rights to Templates – Step 3



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- Templates are active and can be edited in real time by assigned staff (Title I Director, Bookkeeper (District Level and School Level), Principals, Assistant Principal, Parental Involvement Coordinator)

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Advantages

- Real Time Document
- Allows template creator to assign rights to edit or view
- Allows template creator to protect cells or sheet
- Allows for interactive communication (Comments)
- Builds transparency
- Builds building-level capacity and ownership
- Saves paper
- Allows one to copy and paste from Drive to Portal
- Strengthens internal controls

Things to Consider

- Must have a Google Account
- Google and Google Drive are free.
- Provide training to others in using your templates
- Pre-populate the Heading within the Description: ensures consistency and accuracy
- Google Drive allows one to download the document as a Microsoft Excel or PDF document
- The Original Budget and all Amendments can be all "Tabbed" within one Google Drive File
- Once a budget is placed in the Portal, change the settings from "EDIT" to "VIEW" to allow no additional budget revisions
- Google Drive also has apps similar to Word, PowerPoint, and Survey Monkey

Questions and Answers

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Title I, Part A Program Specialists' Contact Information



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