

Consolidation of Funds





Consolidation of Funds



Richard Woods,
Georgia's School Superintendent
"Educating Georgia's Future"
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Shawn Owen, Director of Consolidated Federal Initiatives
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Last Updated: 7/1/2018

What is Consolidation of Funds?

It is your districts answer to...

If Only
&

That 4:00am Wake-up Call

What will Consolidation do for my District?

Spend federal funds
based on student
needs rather than
primarily focusing on
compliance.



What is it?

- An Initiative to fully consolidate federal, state, and local funds in specific Title I schools that operate schoolwide programs.



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CONSOLIDATION OF FUNDS MANUAL FOR TITLE I SCHOOLWIDE CONSOLIDATION PROGRAMS



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August 2016



Federal

State

Local

Pool of Money

Lose Identity



**State
Money**



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Flexibility:

- Once state, local and federal funds are consolidated, the federal funds lose their identity as federal funds, and expenditures of those funds are no longer limited to the federal requirements for the individual programs. (p. 18)

Flexibilities only apply to Consolidated Funds.



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Allowability:

- A schoolwide program school that consolidates federal program funds “is not required to meet most statutory or regulatory requirements of the program applicable at the school level, but must meet the intent and purposes of that program to ensure that the needs of the intended beneficiaries are met.” (See Non-Regulatory Guidance, Sec. E-1, Page 50)

Allowable Expenses:



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- **School resource officer, security guard;**
- **Clinic aide, school nurse, clinic supplies;**
- **ELL coordinators, ELL required forms and tests;**
- **Behavioral intervention positions;**
- **Marketing items such as brochures, banners, and flags;**
- **Memberships for professional organizations;**
- **Field trips;**
- **Food/snack items for students and parents;**
- **Guidance counselors; and**
- **Similar expenses to help remediate the effects of poverty in support of the schoolwide program.**



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Time and Effort:

- A schoolwide school that consolidates federal, state and local funds “is not required to keep any time and effort documentation on employees paid out of the consolidated pool of funds, unless otherwise required by the state and local district.” (See Non-Regulatory Guidance, Sec. E-17, Page 63)



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Property Records:

- Items purchased with consolidated funds should reflect that Schoolwide Consolidation of Funds as the Title holder on the inventory records.
- All other state and local requirements for inventory management must be followed.

Procedures above only apply to Consolidated Funds.

Procurement Records:



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- The federal procurement requirements under the Uniform Grant Guidance **are not applicable to contracts paid for with consolidated funds.**
- However, generally accepted accounting principles would still dictate that records be kept on any contracts paid for with consolidated funds, in accordance with all applicable state and local laws, policies, and regulations.

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Main Issues to Overcome

- Fear of being first
- Fear of being non-compliant
- Fear of the audit
- Fear of CFM

Fear, Creativity and Innovation have a hard time coexisting together!



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CONSOLIDATION OF FUNDS
MANUAL FOR TITLE I
SCHOOLWIDE CONSOLIDATION
PROGRAMS



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August 2016



CONSOLIDATION OF FUNDS
MANUAL FOR TITLE I
SCHOOLWIDE CONSOLIDATION
PROGRAMS



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- Revisions-
- 1st ed- 8/17/16
- 2nd ed- 7/20/17
- 3rd ed- 4/24/18

USDE- Submitted 8/16/16

Input Received- 5/11/18



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CONSOLIDATION OF FUNDS
MANUAL FOR TITLE I
SCHOOLWIDE CONSOLIDATION
PROGRAMS



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September 2017

Seven Functional Categories



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1000

- Instruction

2100

- Pupil Services

2210

- Improvement of Instructional Services

2213

- Instructional Staff Training

2220

- Educational Media Services

2400

- School Administration

New

2700

- Transportation (supplemental)

Federal Programs that can be Consolidated

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IA- Improving Basic Programs Operated by LEAs

IC- Education of Migratory Children

ID- subpart 2 only- Prevention & Intervention Programs for Children & Youth who are Neglected, Delinquent or At-Risk

IIA- Supportive Effective Instruction

IIIA- English Language Acquisition, Language Enhancement, and Academic Achievement Act

Federal Programs that can be Consolidated

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IVA- Student Support and Academic Enrichment

VB- Rural Education Initiative

School Improvement 1003(a)

School Improvement 1003(g)

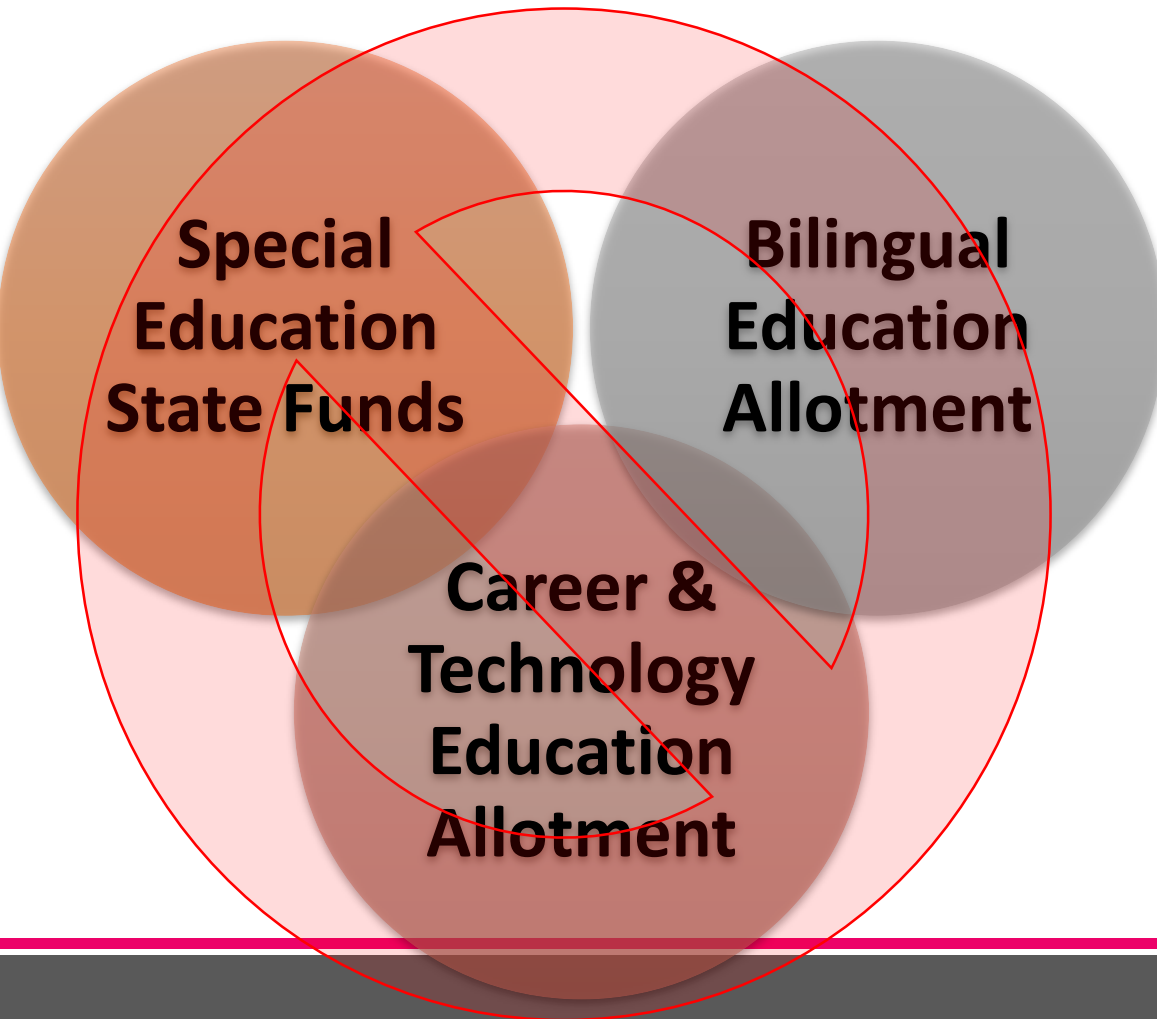
McKinney-Vento- Education of Homeless Children and Youth

Special Education Federal Funds- 611 and 619

State Funds NOT to be consolidated- Special Allotments



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Although some state and local funds may not be consolidated, those funds may still be used in conjunction with federal monies to implement federal program requirements.



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1% Parent Engagement
Equitable Services
Homeless
Administrative
District Initiatives



Set asides
still
apply...

System
determines the
proportion of
state, local and
federal funds
to consolidate

Not Fund 400
Not
Consolidated
Admin

Title 1
Schoolwide
School

System
determines
the federal
programs
consolidated

Money is at
the school
level

1 or more
federal
programs
must be
combined

Transfer of Funds



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- **Transfer of funds**
 - Helps simplify financial reporting
 - Helps simplify intents and purposes at district and school level
 - Helps simplify monitoring
 - Does NOT restrict allowability b/c LEA is consolidating w/ state and local

Allocation of Funds



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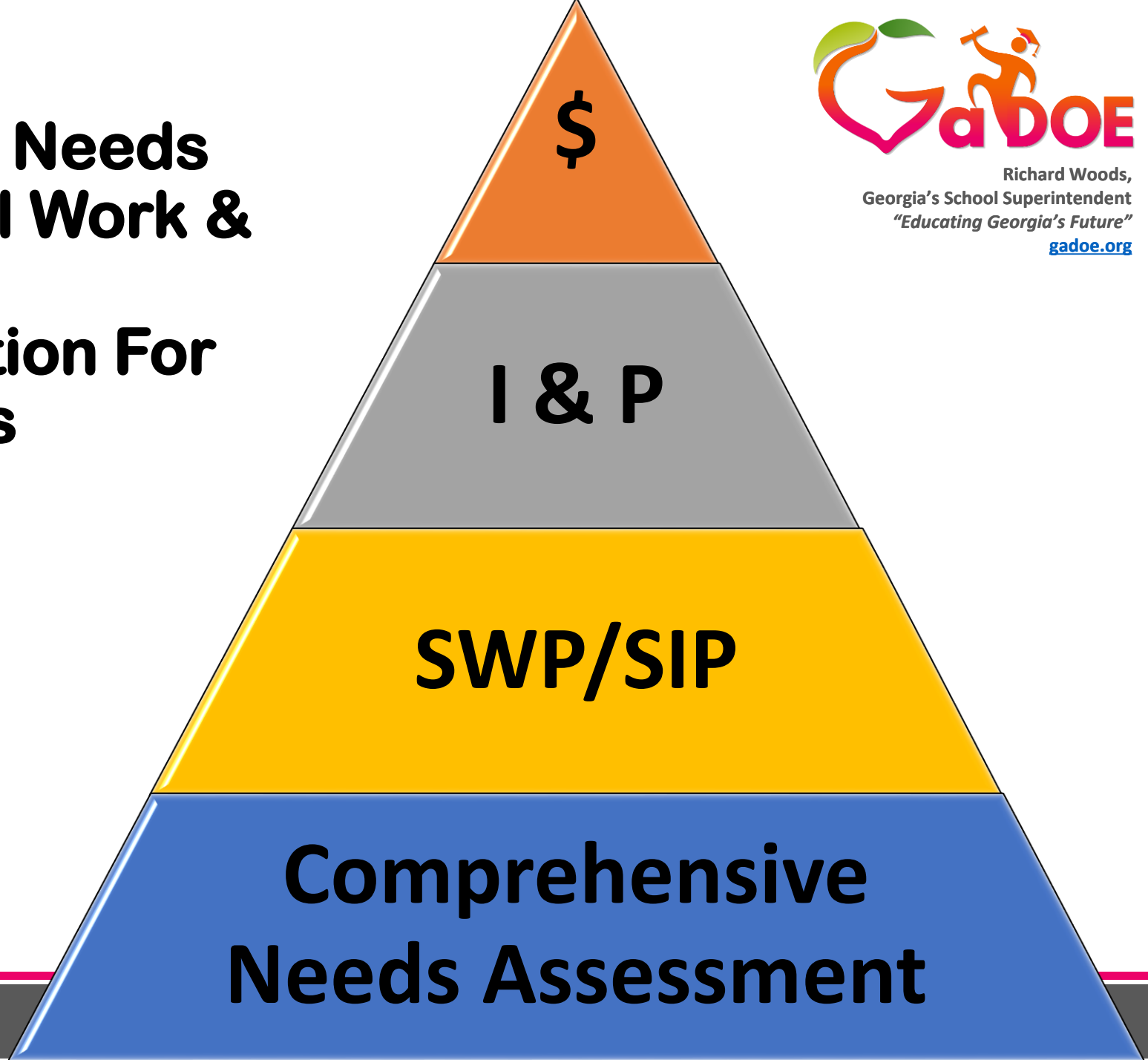
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**Comprehensive
Needs Assessment**

**Schoolwide School
Improvement Plan**

Intent & Purposes

**Student Needs
Drive All Work &
Lay The
Foundation For
Success**



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Intent & Purposes

Georgia Department of Education

APPENDIX A- Budget Template 1

Schoolwide School Improvement Plan-Combining Funds How the school will meet the Intent and Purpose of each funding source?

- Complete an Intent and Purposes chart for EACH schoolwide school participating in schoolwide consolidation. Sample below.
- Provide an accurate description of how the intent and purposes will be met for each program to be included in the consolidation. [The intent and purposes statement may or may not reflect how the money from each funding source is being spent, but must explain how the school is meeting the intent of the specific program legislation]
- Attach template for EACH school consolidating funds to the Consolidated Application

District Name:		Fiscal Year:
School Name:		Date Submitted:
Grade Level:		
Describe how the Intent and Purpose for each consolidated funding source will be met by the school		
Program	Intent and Purpose Statement	
Title I, Part A	Extended Learning Time with interventions to reinforce academic standards, afterschool program, additional in-class assistance, small group pull-out when needed to reinforce academic standards, software and other materials and training to support content learning, Family Engagement Coordinator, reading and math inventories, technology to support interventions, instructional coaches and PBIS.	
Title I, Part C	In class, small group pull-out, intersession, after school and summer school supplemental academic support, in-class tutoring, before/after school, extended day, Saturday or vacation programs, in-home instruction (e.g., the MEP provides family literacy services to the child at home) and summer or intersession programs	
Title I, Part D	After school and summer tutoring at N&D facilities. Establish reading library at N&D facilities. Implement mentoring program for youth living in local residential facility.	
Title II, Part A	Professional learning communities and data teams, data coach, ongoing reading and writing training, content specific trainings and conferences, instructional lead teacher, teacher induction/mentor program	
Title III, Part A Language Instruction for English Learners	Title III specialist to conduct EL-related PD and home visits, conferences and trainings on ACCESS data analysis and using ACCESS scores to support classroom instruction, extra language support during the instructional day, EL-specific materials and program supplies that correlate to our mainstream ELA and math textbooks, afterschool tutorials	

Title III, Part A Language Instruction for Immigrant Students	Literature on acclimating to U.S. culture, information gathered and distributed on local supports for newcomers (library, driver license facilities, county health facilities, local transportation, religious services, English language classes for adults, etc.), online language program for immigrant students/parents who are non-English speaking.
Title IV, Part A *See below	Provide students with access to well-rounded education by integrating STEM skills and content knowledge across curricula and lessons in all grade levels; Improve school conditions for student learning by implementing PBIS framework and providing school safety training for all school staff; Improve the effective use of technology by building professional learning communities that will improve instruction through increased use of online systems to analyze and track individual student data
Title V, Part B	Increase professional learning technical assistance hours by 4 hours per teacher by supplementing established Title I, Part A quarterly data team analysis activities. Supplement Title I, Part A funded extended learning time with interventions to reinforce academic standards, afterschool program, additional in-class assistance, small group pull-out when needed to reinforce academic standards.
Title I, 1003 (a)	Professional learning communities, training for teachers, academic coaches, after school tutoring,
Title I, 1003 (g)	Increase student achievement and school performance significantly by implementing the SBOE approved grant and all assurances with fidelity.
McKinney-Vento	Implement a McKinney-Vento Education for Homeless Children and Youth (EHCY) after-school tutoring program to reduce identified learning gaps between homeless and non-homeless students. Designate a counselor to monitor the attendance of students experiencing homelessness and contact guardians if attendance rate falls below expected levels.

Signatures:

Title I Director _____ Date _____ Title II Director _____ Date _____
 Title III Director _____ Date _____ Superintendent _____ Date _____
 Principal _____ Date _____

Title IVA- Each school receiving Title IVA funds from the district is not required to address each of the three core areas (Well-Rounded, Safe and Healthy, and Effective Use of Technology). However, the district is responsible for ensuring that all three areas are being addressed through both district and school initiatives. Therefore, it is possible that a school could submit the Intent and Purpose form that only addresses one area but the district collectively is meeting the intent and purpose. For the purpose of the sample Intent and Purpose form, all three areas are addressed in order to provide examples for each one.

Consolidation of Funds Website- Manual

Georgia Department of Education

The Georgia Department of Education and school districts across Georgia are conducting the Consolidation of Funds Initiative to fully consolidate federal, state, and local funds in specific Title I schools that operate schoolwide programs. Once these funds are consolidated, the federal funds lose their identity as federal funds, and expenditures of those funds are no longer limited to the federal requirements for individual programs. A schoolwide program school that consolidates federal program funds "is not required to meet most statutory or regulatory requirements of the program applicable at the school level, but must meet the intent and purposes of that program to ensure that the needs of the intended beneficiaries are met."

If you are interested in more information regarding Consolidation of Funds, please reach out to Shaun Owen.

If you are interested in your LEA being part of the third cohort for the 2018-2019 school year, please complete the [Declaration of Interest online form](#) by April 30th, 2018.

Consolidation of Funds Map

- [Consolidation of Funds Map](#)

Consolidation of Funds Manual

- [Consolidation of Funds Manual](#)

Consolidation of Funds Webinars

- [Consolidation of Funds Overview \(webinar\)](#)
- [Consolidation of Funds Overview \(PPT\)](#)
- [Consolidation of Funds for Finance Directors \(webinar\)](#)
- [Consolidation of Funds for Finance Directors \(PPT\)](#)

Contact Information

Shaun Owen

Director of Consolidated Federal Initiatives
State Ombudsman
404-971-0096
sowen@doe.k12.ga.us

Consolidation Updates May 2018

[Consolidation of Funds Updates - 5/9/2018](#)

Financial Resources

[Consolidated Schoolwide Financial Checklist](#)

[Budget and Allocation Template \(Example A\)](#)

[Financial Template \(Example B\)](#)

[Financial Template \(Example C\)](#)

[Tips for Fiscal Year Closing](#)

T&E/CPI



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Flexibility:

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Allowable Expenses:



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- **School resource officer, security guard;**
- **Clinic aide, school nurse, clinic supplies;**
- **ELL coordinators, ELL required forms and tests;**
- **Behavioral intervention positions;**
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- **Memberships for professional organizations;**
- **Field trips;**
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Time and Effort:

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Property Records:

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- However, generally accepted accounting principles would still dictate that records be kept on any contracts paid for with consolidated funds, in accordance with all applicable state and local laws, policies, and regulations.

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Transferability



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An LEA may transfer funds, to better address local identified needs, to the following programs:

- Title I, Part A – Improving basic programs operated by LEAs
- Title I, Part C – Education of migratory children
- Title I, Part D – Prevention and intervention programs for children and youth who are neglected, delinquent, or at-risk
- Title II, Part A – Supporting effective instruction state grants
- Title III, Part A – State grants for English language acquisition and language enhancement
- Title IV, Part A – Student support and academic enrichment grants
- Title V, Part B – Rural education

ESEA section 5103(b)

Components of Consolidation

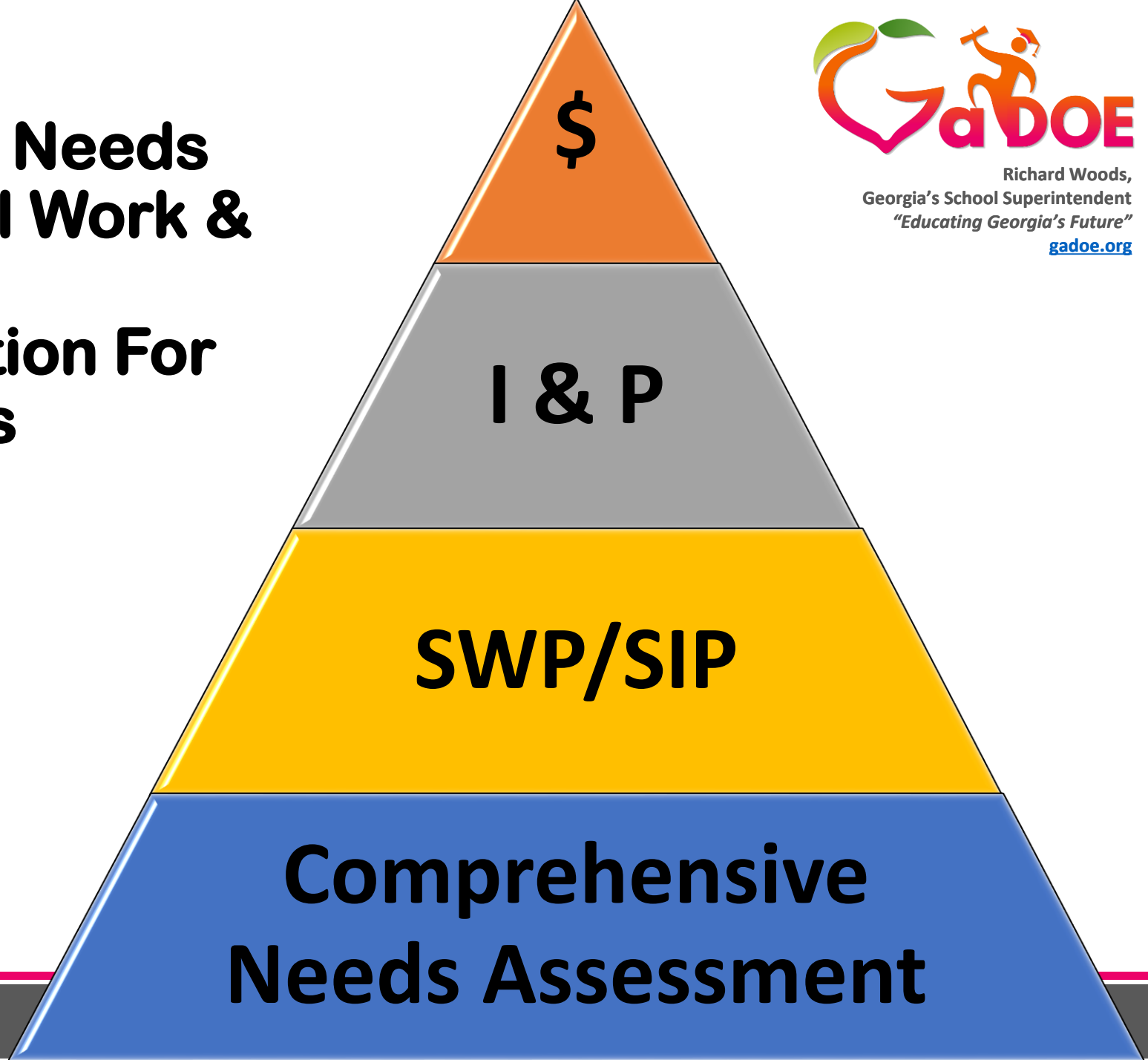
Georgia Department of Education

**Comprehensive
Needs Assessment**

**Schoolwide School
Improvement Plan**

Intent & Purposes

**Student Needs
Drive All Work &
Lay The
Foundation For
Success**



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Consolidation of Funds Website- Webinars

Georgia Department of Education

Website



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Consolidation of Funds Map

- Consolidation of Funds Map

Consolidation of Funds Manual

- Consolidation of Funds Manual

Consolidation of Funds Webinars

- Consolidation of Funds Overview (webinar)
- Consolidation of Funds Overview (PPT)
- Consolidation of Funds for Finance Directors (webinar)
- Consolidation of Funds for Finance Directors (PPT)
- March Webinar-Where Should We Be Now? Focus on Finance (webinar)
- March Webinar-Where Should We Be Now? Focus on Finance (PPT)
- April Webinar - Where Should We Be Now? Focus on Finance (webinar)
- April Webinar - Where Should We Be Now? Focus on Finance (PPT)

Monthly
Webinars

SWP/SIP

Georgia Department of Education

**SCHOOLWIDE IMPROVEMENT PLAN (SIP)
TITLE I SCHOOLWIDE PROGRAM (SWP) PLAN
TITLE I TARGETED ASSISTANCE (TA) PLAN**

NAME OF SCHOOL/PRINCIPAL:

Melissa White

NAME OF DISTRICT/SUPERINTENDENT:

Cartersville City Schools – Dr. Howard Hinesley

Comprehensive Support School *Targeted Support School* *Schoolwide Title I School* *Targeted Assistance Title I School*
 Non-Title I School *Opportunity School*

DIVISION OF SCHOOL AND DISTRICT EFFECTIVENESS

Advancing Leadership | Transforming Schools

All required components of the Title I Schoolwide and Targeted Assistance are included in this template.

SMART GOAL #3: From August 2016 to May 2017, Cartersville Elementary School will increase the implementation of effective instructional technology, as evidenced by an instructional technology staff survey.

(SWP 2, 7, 9, 10)

Georgia School Performance Standard	Student Group (All or Subgroup, Parents, Teachers) (SWP 9)	Action /Strategies Include description of SWP 2, 7, 9, 10)	Evaluation of Implementation and Impact on Student Learning		Monitoring Actions of Implementation	Estimated Cost, Funding Source, and/or Resources
			Artifacts	Evidence		
Instruction Standard 6: Uses appropriate, current technology to enhance learning Professional Learning Standard 4: Uses multiple professional learning designs to support the various learning needs of the staff	ALL STEM Committee	The instructional technology specialist will provide job-embedded professional development to teachers which will include, but is not limited to: Office 365, zSpace, PowerTeacher, online applications, and administrative operations. CES will continue to purchase technology equipment, which will support teaching and learning, to maintain a fully operational and effective technology program. CES students will complete a digital citizenship course prior to accessing internal student e-mail on Office 365. CES STEM committee members will attend STEM conferences and local STEM certified elementary schools to pursue STEM initiatives at CES	Technology Staff Survey Needs assessment – ongoing Agendas from STEM conferences and visits	School Leaders Demonstrate: Competency in selecting appropriate technology and professional development in order to support teaching and learning. Teachers Demonstrate: Effective use of instructional technology in the classroom. Students Demonstrate: Understanding of digital citizenship and appropriate ways to use technology for learning. Parents Demonstrate: Understanding of students' online identity and available online resources for student use.	Classroom Observations Lesson Plans Digital Citizenship Course completion report STEM lab progression; agendas and time log of STEM lab use	TBD \$1,500

Intent & Purposes

Georgia Department of Education

APPENDIX A- Budget Template 1

Schoolwide School Improvement Plan-Combining Funds How the school will meet the Intent and Purpose of each funding source?

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- Attach template for EACH school consolidating funds to the Consolidated Application

District Name:		Fiscal Year:
School Name:		Date Submitted:
Grade Level:		
Describe how the Intent and Purpose for each consolidated funding source will be met by the school		
Program	Intent and Purpose Statement	
Title I, Part A	Extended Learning Time with interventions to reinforce academic standards, afterschool program, additional in-class assistance, small group pull-out when needed to reinforce academic standards, software and other materials and training to support content learning, Family Engagement Coordinator, reading and math inventories, technology to support interventions, instructional coaches and PBIS.	
Title I, Part C	In class, small group pull-out, intersession, after school and summer school supplemental academic support, in-class tutoring, before/after school, extended day, Saturday or vacation programs, in-home instruction (e.g., the MEP provides family literacy services to the child at home) and summer or intersession programs	
Title I, Part D	After school and summer tutoring at N&D facilities. Establish reading library at N&D facilities. Implement mentoring program for youth living in local residential facility.	
Title II, Part A	Professional learning communities and data teams, data coach, ongoing reading and writing training, content specific trainings and conferences, instructional lead teacher, teacher induction/mentor program	
Title III, Part A Language Instruction for English Learners	Title III specialist to conduct EL-related PD and home visits, conferences and trainings on ACCESS data analysis and using ACCESS scores to support classroom instruction, extra language support during the instructional day, EL-specific materials and program supplies that correlate to our mainstream ELA and math textbooks, afterschool tutorials	

Title III, Part A Language Instruction for Immigrant Students	Literature on acclimating to U.S. culture, information gathered and distributed on local supports for newcomers (library, driver license facilities, county health facilities, local transportation, religious services, English language classes for adults, etc.), online language program for immigrant students/parents who are non-English speaking.
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Title V, Part B	Increase professional learning technical assistance hours by 4 hours per teacher by supplementing established Title I, Part A quarterly data team analysis activities. Supplement Title I, Part A funded extended learning time with interventions to reinforce academic standards, afterschool program, additional in-class assistance, small group pull-out when needed to reinforce academic standards.
Title I, 1003 (a)	Professional learning communities, training for teachers, academic coaches, after school tutoring,
Title I, 1003 (g)	Increase student achievement and school performance significantly by implementing the SBOE approved grant and all assurances with fidelity.
McKinney-Vento	Implement a McKinney-Vento Education for Homeless Children and Youth (EHCY) after-school tutoring program to reduce identified learning gaps between homeless and non-homeless students. Designate a counselor to monitor the attendance of students experiencing homelessness and contact guardians if attendance rate falls below expected levels.

Signatures:

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 Principal _____ Date _____

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Consolidation of Funds Website- Program Overview "One Pager"

Consolidation Updates May 2018

Consolidation of Funds Updates - 5/9/2018

Financial Resources

Consolidated Schoolwide Financial Checklist

Budget and Allocation Template (Example A)

Financial Template (Example B)

Financial Template (Example C)

Tips for Fiscal Year Closing

Program Resources

Consolidation Overview for 2018-2019

Website

Program Overview

One Pager

Consolidation of Funds for Title I Schoolwide Consolidation Programs

(2018-2019)

The following federal funds are available for consolidation under the Initiative:

- Title I, Part A – Improving Basic Programs Operated by Local Educational Agencies
- Title I, Part C – Education of Migratory Children ←
- Title I, Part D Subpart 2 only – Prevention and Intervention Programs for Children and Youth who are Neglected, Delinquent or At-Risk
- Title II, Part A – Supportive Effective Instruction (previously known as Teacher Quality)
- Title III, Part A – English Language Acquisition, Language Enhancement, and Academic Achievement Act
- Title IV, Part A – Student Support and Academic Enrichment
- Title V, Part B – Rural Education Initiative
- Title I – School Improvement 1003(a) (amended by ESSA to include new set-asides and authority for new subgrants to LEAs- ends 9/30/21)
- Title I – School Improvement 1003(g) (eliminated under ESSA, though current programs will continue until the end of the grant period)
- McKinney-Vento – Education for Homeless Children and Youth

New

The following special allotments may not be consolidated in a schoolwide consolidation fund:

- Special Education State Funds
- Bilingual Education Allotment
- Career and Technology Education Allotment

The Pilot Systems will establish a consolidated schoolwide pool for each school that is consolidating funds as part of the schoolwide program. This pool should be based on those expenditures that are in support of the following seven functional categories:

- 1000 – Instruction
- 2100 – Pupil Services
- 2210 – Improvement of Instructional Services
- 2213 – Instructional Staff Training
- 2220 – Educational Media Services
- 2400 – School Administration
- 2700 – Transportation (Supplemental academic services only- for example field trips, after school programs such as tutoring, summer programs and work placement)

– New

- Underlined funds and functional categories are newly added for the 2018-2019 school year.

2018-2019

Program
Overview

"One Pager"

Consolidation of Funds Website- Monthly Updates

Georgia Department of Education

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Consolidation Updates May 2018

[Consolidation of Funds Updates - 5/9/2018](#)

Financial Resources

[Consolidated Schoolwide Financial Checklist](#)

[Budget and Allocation Template \(Example A\)](#)

[Financial Template \(Example B\)](#)

[Financial Template \(Example C\)](#)

[Tips for Fiscal Year Closing](#)



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Consolidation of Funds Updates

Contact- Shaun Owen (sowen@doe.k12.ga.us 404-971-0096)
May 9, 2018

- Additional Function Codes (added for the 2018-2019 school year)
 - 2400- School Administration has been added to the Fund 150 Function Codes
- All Function Codes (that can be paid for out of Fund 150) ([see one-page overview](#))
 - 1000- Instruction
 - 2100- Pupil Services
 - 2210- Improvement of Instructional Services
 - 2213- Instructional Staff Training
 - 2220- Educational Media Services
 - 2400- School Administration
 - 2700- Transportation (Supplemental academic services only)
- Additional Program (added for the 2018-2019 school year) ([see one-page overview](#))
 - IC- Migratory Education
- Third Cohort ([see map for the 2018-2019 school year](#))
 - 12 LEAs for the Third Cohort
 - 9 LEAs for the First and Second Cohort
 - 21 total LEAs
- Consolidation of Funds [Manual](#)
 - Updated in April regarding Financial Procedures (discussed in the [April webinar](#))
 - Additional updates to add IC, 2400, and update the Intent and Purposes template will be coming within the next week
- [April Webinar](#)
 - Financial Updates
 - Allocating Funds to Schools (IA, IIA, IIIA, IVA)
 - [PPT](#)
- [May Webinar](#)
 - The webinar has been moved to Friday, June 1st from 1:00-2:00, due to a DOE event



Richard Woods, Georgia's School Superintendent
"Educating Georgia's Future"

- [Consolidated Schoolwide Financial Checklist](#)
 - Please review the Financial Checklist to assist with Consolidation. It is a general checklist that should be modified by each school district to their specific processes. The checklist should address all key points to consider when implementing the Consolidation of Funds Initiative.
- [Consolidation and Cross-Functional Monitoring](#)
 - Participating in a new initiative requires additional time and effort on the part of Federal programs and finance office staff throughout the year. Therefore, to offer some additional flexibility given this reality, first year participating LEAs who are also scheduled for Cross-Functional Monitoring may request a one year deferment, by emailing Associate Superintendent for Federal Programs, Mr. Craig Geers, at cgeers@doe.k12.ga.us.

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Site Visits

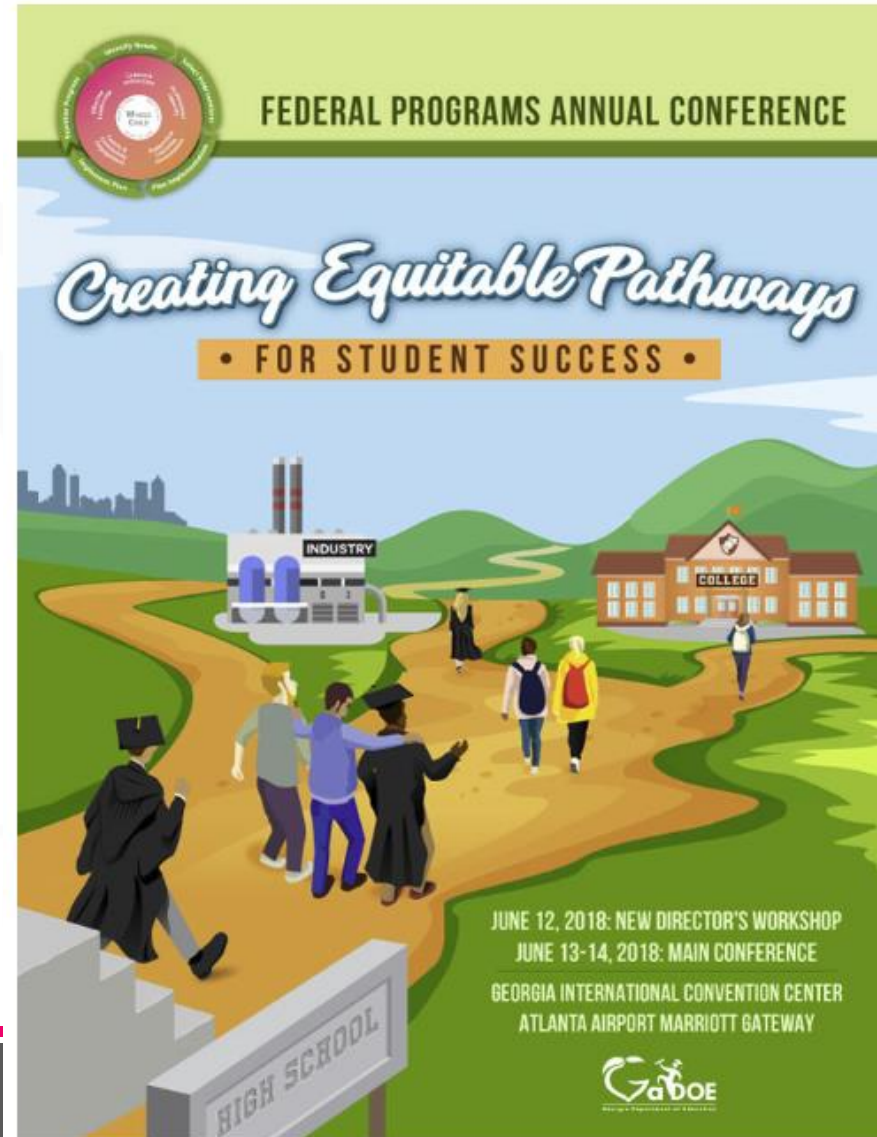


Site Visits

First Cohort	Second Cohort	Third Cohort
Oct/Nov- Face-to-Face	Oct/Nov- Face-to-Face	Oct/Nov- Large/Whole Group
Feb/March- Face-to-Face	Feb/March- Face-to-Face	Feb/March- Face-to-Face
June/July- Face-to-Face	June/July- Virtual (request of LEA)	June/July- Virtual (request of LEA)
Sept/Oct- Face-to-Face	Sept/Oct- Face-to-Face	Sept/Oct- Face-to-Face

Federal Programs Conference

Georgia Department of Education



FEDERAL PROGRAMS ANNUAL CONFERENCE

Creating Equitable Pathways


• FOR STUDENT SUCCESS •

INDUSTRY

COLLEGE

HIGH SCHOOL

JUNE 12, 2018: NEW DIRECTOR'S WORKSHOP
JUNE 13-14, 2018: MAIN CONFERENCE
GEORGIA INTERNATIONAL CONVENTION CENTER
ATLANTA AIRPORT MARRIOTT GATEWAY



Federal Programs Conference

June 13th				
GISS	Salon 7	10:15-11:15	Looking for Greater Flexibility & Allowability	
June 14th				
GISS	Kenyan Suite 1-2	10:30-11:30	Looking for Greater Flexibility & Allowability	
GISS	Spanish Suites 1-2	11:40-12:40 Lunch Group A	COF Planning Meeting for LEAs in Consolidation	

TEAMWORK

Finance



Richard Woods,
Georgia's School Superintendent
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gaDOE.org

**Federal
Programs**



Principals

**Central
Office**





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Shaun Owen

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