FY18 Project 515 Budget Training

The Office of School Support

OKLAHOMA STATE DEPARTMENT OF
EDUCATION
CHAMPION EXCELLENCE

- Timeline

- FY17 Closeout Options

- FY18 Project 515 Budget

- Review Process

- Claims

- EngageOK

- Questions

OKLAHOMA STATE DEPARTMENT OF
EDUCATION
CHAMPION EXCELLENCE

- 06/30/17   - FY17 grant year ends; Last day to encumber FY17 funds

- 07/01/17   - FY18 SW/SI Plan & Project 515 budget open

- 08/01/17   - FY17 claim deadline; Claims received after will be considered LATE

- 08/31/17   - Any remaining open FY17 applications will be closed; Remaining funds will be carried over to FY18 Budget*

- 09/30/17   - 2nd year carryover expires; Last day to encumber 2nd year carryover

- 10/01/17   - FY18SW/SI Plan & Project 515 budget deadline

- 10/31/17   2nd year carryover claim deadline

*see closeout process for this year

OKLAHOMA STATE DEPARTMENT OF EDUCATION
— CHAMPION EXCELLENCE —

NEW! FY17 Closeout Options

Submit Closeout Report	Grant Cycle Closeout
• Same process as Title I, II, III • LEA creates a closeout report in GMS; submits it to SDE • Project 515 Closeout Report would be available last week of June • Allows carryover to be available in GMS budget when created	• Same process as last year • Office of School Support closes out all FY17 budget after August State Board Meeting • Carryover won't be available in GMS budget until September

OKLAHOMA STATE DEPARTMENT OF
EDUCATION
CHAMPION EXCELLENCE

FY18 Project 515

BUDGET

- Opens July 1, 2017

- District Level
  - District/Superintendent should complete the budget (collaborate with Principal)
  - Site budgets contained on Budget Detail tab

- Carryover will be moved into FY17 budget after closeout (date pending)

OKLAHOMA STATE DEPARTMENT OF
EDUCATION
CHAMPION EXCELLENCE

Maximum Carryover

2014-15 Designation Awards	2015-16 Designation Awards
Priority Sites = $20,600	Priority Sites = $22,221.89
4th Yr Focus Sites = $8,000	5th Yr Focus Sites = $10,000
3rd Yr Focus Sites = $5,000	4th Yr Focus Sites = $8,000
	3rd Yr Focus Sites = $5,000

OKLAHOMA STATE DEPARTMENT OF
EDUCATION
CHAMPION EXCELLENCE

Rationale for Repeat Expenditures

- Sites intending to expend School Improvement funds on identical software, technology, personnel, supplies, and materials as FY17 will be required to provide a data-based rationale for the purchase

OKLAHOMA STATE DEPARTMENT OF
EDUCATION
CHAMPION EXCELLENCE
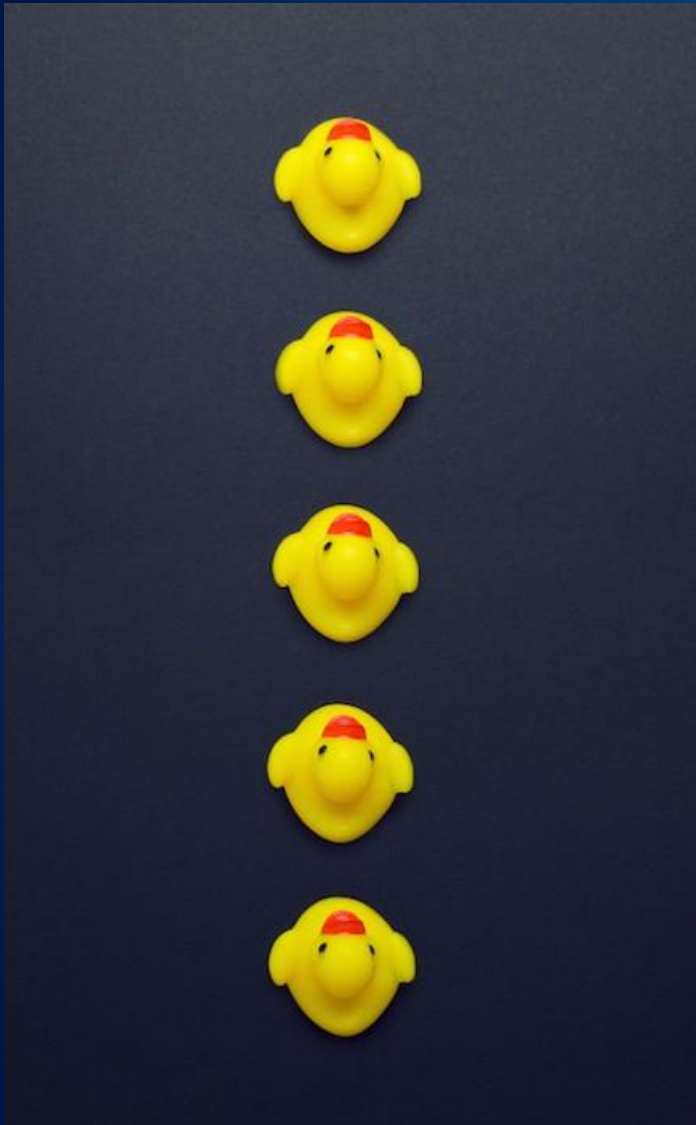
Rationale for Repeat Expenditures

SHOULD INCLUDE

- Data (percentages, numbers, indicators of growth)

- Evidence that the expenditure is effecting positive change

SHOULD NOT INCLUDE

- The same wording used in the SW/SI Plan

- Anecdotal or subjective responses

- A re-stating of the expenditure description

OKLAHOMA STATE DEPARTMENT OF
EDUCATION
CHAMPION EXCELLENCE

- Expenditures are expected to be aligned with SW/SI Plan

- Personnel/Positions are expected to be aligned with SW/SI Plan

OKLAHOMA STATE DEPARTMENT OF
EDUCATION
— CHAMPION EXCELLENCE —

Personnel

- Need to be entered in School Personnel Records (SPR)
  - Allowable Job Code
  - Coded to Project 515
  - Reasonable and Necessary Salary

- Personnel names can be entered in the description box on the Budget Detail Page

  Or

- Position Title can be entered in the description box on the Budget Detail Page

- Name must appear on claim

- Reviewer will verify SPR

OKLAHOMA STATE DEPARTMENT OF EDUCATION
CHAMPION EXCELLENCE

Personnel

- Tutors
  - Need to be certified in the content area (ESSA)
- Extended Day/Summer School Teachers
  - 515 does NOT pay for regular classroom teachers
- Teacher-Trainers/Mentors/Teacher-Leaders
  - Site level only
- Paraprofessionals/Teacher Assistants/Classroom Aides
  - Must include detailed description of position in SW/SI Plan

OKLAHOMA STATE DEPARTMENT OF
EDUCATION
CHAMPION EXCELLENCE

- Expenditure descriptions are expected to be detailed
  - "Supplies" is not sufficient
  - Unknown expenditures can be indicated with phrases like "to be determined" or "place holder"
  - Amendments can be made anytime

OKLAHOMA STATE DEPARTMENT OF
EDUCATION
CHAMPION EXCELLENCE

- FY18 Allocation* - up to 5% can be spent on consumables such as ink, toner, paper, postage, etc.

- OCAS code 1000/600

- Consumable items for Professional Development, Data Rooms, and Parental Involvement will be determined on a case by case basis (if the amounts exceed 5% of the allocation)

*Does NOT mean 5% of total funds, since 5% were allowed to be utilized in FY17.
$22,221.89 = $1,111.09
$10,000 = $500
$8,000 = $400
$5,000 = $250

OKLAHOMA STATE DEPARTMENT OF
EDUCATION
CHAMPION EXCELLENCE

FY18 SW/SI Plan & Project 515 Budget

REVIEW PROCESS

- SW/SI Plan and FY18 Budget are not linked in GMS

- Either can be submitted and amended independently of each other

- Districts and Sites are to work collaboratively to ensure that SW/SI Plan and Budget align

OKLAHOMA STATE DEPARTMENT OF
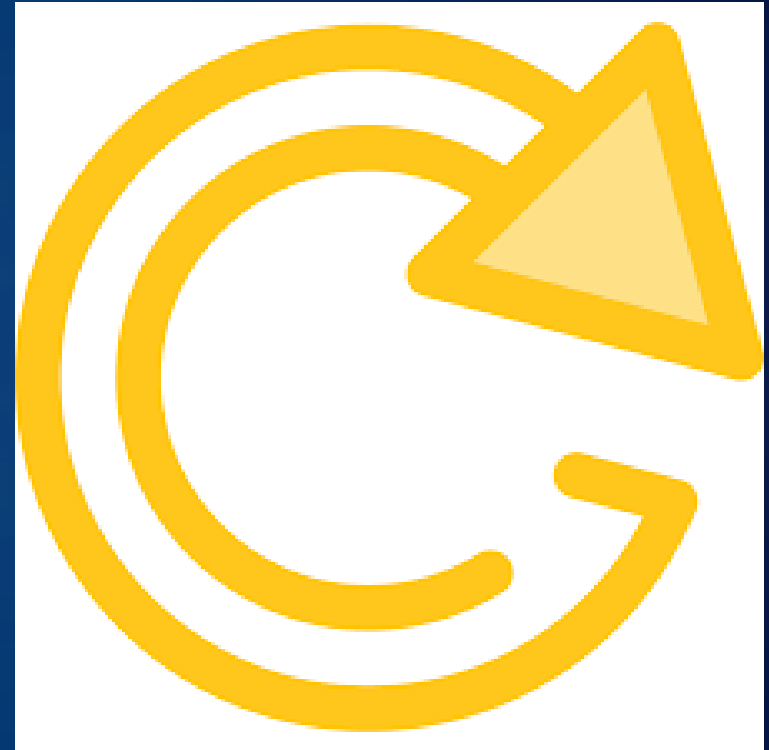EDUCATION
— CHAMPION EXCELLENCE —

- Reviewers will need both the SW/SI Plan and Budget in order to complete the review process

- If only one is submitted, reviewers will contact sites to discuss the status of the other piece

OKLAHOMA STATE DEPARTMENT OF
EDUCATION
CHAMPION EXCELLENCE

Returned Budgets

- Expenditure descriptions are general

- Expenditures do not align with SW/SI Plan

- Coding is incorrect

- For Focus sites: Expenditures do not align w/ Focus sub-group

OKLAHOMA STATE DEPARTMENT OF
EDUCATION
CHAMPION EXCELLENCE

Project 515

CLAIMS

Documentation

The Office of School Support follows the OSDE Joint Federal Programs Claims Procedures for documentation requirements

http://sde.ok.gov/sde/sites/ok.gov.sde/files/Joint%20Federal%20Programs%20Claims%20Procedures.pdf

OKLAHOMA STATE DEPARTMENT OF EDUCATION
CHAMPION EXCELLENCE

Documentation

- Zero dollar claims are not required

- Purchase Orders are not required

- Copies of checks should NOT be uploaded

Personnel

- Salaries (Object Code 100) include extra duty and stipends per OCAS manual

- Documentation in the form of a timesheet, tutoring log, or time & effort IS REQUIRED for all positions that work outside of a regular contract day

- Personnel should be entered accurately in School Personnel Records (SPR) BEFORE claiming

OKLAHOMA STATE DEPARTMENT OF
EDUCATION
CHAMPION EXCELLENCE

Personnel

Tutors

- Must be certified in area they are tutoring (ESSA)

- If you are using Object Code 100 (Salary), tutors MUST be employees of the District

- Tutoring is almost never a regular contracted day position, so keep timesheets or logs

- Questions about tutors, please contact our office

OKLAHOMA STATE DEPARTMENT OF EDUCATION
CHAMPION EXCELLENCE

Subscriptions/Licenses/Warranties

- Federal Uniform Grant Guidance (UGG) only allows for 1yr subscriptions, warranties, licenses, etc.
  - Work w/ your vendor before placing order
  - Itemized 3YR Apple Care is not allowable
- This is NOT new

OKLAHOMA STATE DEPARTMENT OF
EDUCATION
CHAMPION EXCELLENCE

Returned Claims

- Date Range is incorrect
  - Start on the 1st day of a month; end on last day of a month
- Coding is incorrect
- Multi-year license, warranty, or subscription
- Documentation for tutors is not provided

OKLAHOMA STATE DEPARTMENT OF
EDUCATION
CHAMPION EXCELLENCE
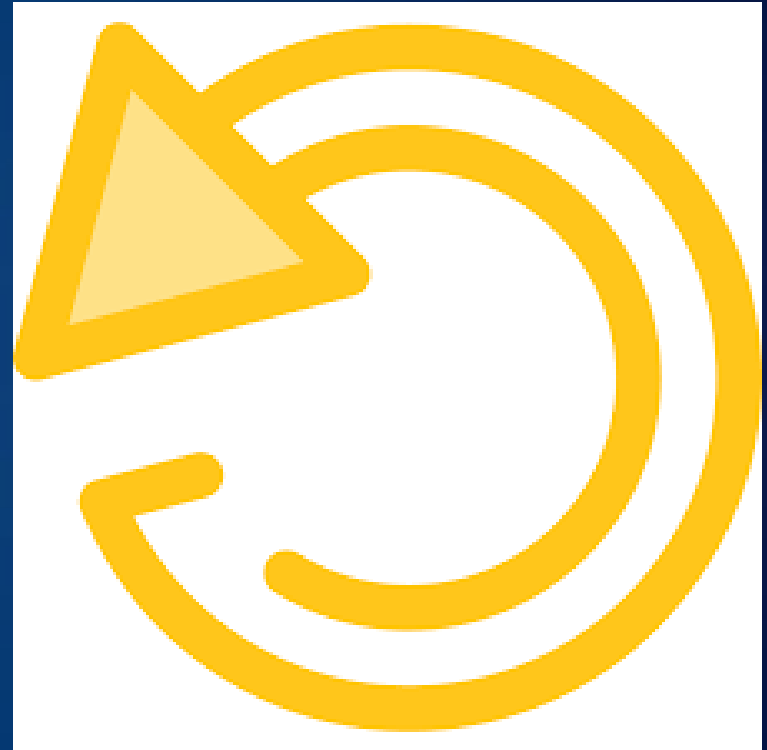
ENGAGEOK ON THE ROAD

School Improvement Sessions

School Support Technical Assistance Room (open all day)

- Let's get started!

- Come and go style session providing step-by-step instructions for creating plans in GMS and walking LEAs through any areas of concern or questions about the school improvement process

Intro to School Improvement/Project 515

- Required session for 3rd Year Focus Sites

- Recommended session for all sites in designation

- Information regarding school improvement requirements, Project 515 funding, and GMS.

OKLAHOMA STATE DEPARTMENT OF
EDUCATION
CHAMPION EXCELLENCE

EngageOK Locations

- 7/10/17 Yukon
- 7/11/17 Union (Tulsa area)
- 7/12/17 Enid
- 7/13/17 Weatherford
- 7/18/17 Durant
- 7/19/17 Ada
- 7/20/17 Cache
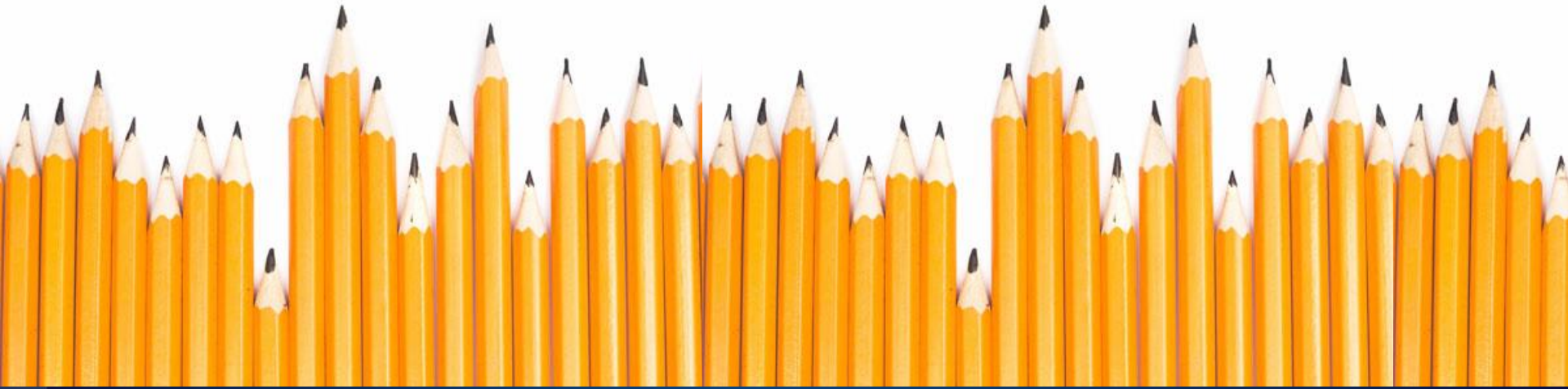
QUESTIONS

OKLAHOMA STATE DEPARTMENT OF
EDUCATION
CHAMPION EXCELLENCE

- Nicholas Clayton, Specialist
  - nicholas.clayton@sde.ok.gov
  - (405) 522-1476
- Deborah Cornelison, Specialist
  - deborah.cornelison@sde.ok.gov
  - (580) 421-5405
- Janel Cypert, Specialist
  - janel.cypert@sde.ok.gov
  - (405) 521-2841
- Jan Foreman, Specialist
  - jan.foreman@sde.ok.gov
  - (580) 618-1000
- Joyce Rock, Specialist
  - joyce.rock@sde.ok.gov
  - (405) 227-6812
- Tina Spence, Specialist
  - tina.spence@sde.ok.gov
  - (405) 521-4513

- Zada Sery, GMS/Grant Consultant
  - zada.sery@sde.ok.gov
  - (405) 521-4269

OKLAHOMA STATE DEPARTMENT OF EDUCATION
CHAMPION EXCELLENCE