

MARYLAND STATE DEPARTMENT OF EDUCATION

TITLE I CRITERIA AND GUIDELINES FOR

COMPARABILITY OF SERVICES



Program Improvement and Family Support Branch
Division of Student, Family, and School Support

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MARYLAND STATE DEPARTMENT OF EDUCATION

TITLE I CRITERIA AND GUIDELINES FOR

COMPARABILITY OF SERVICES

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***Forms only for use if all schools in a grade span are Title I funded.**

FORM A	Word Document
FORMS B and C & B-1 and B-2	Excel Workbook
FORMS D and E & D-1 and D-2	Excel Workbook

MARYLAND STATE DEPARTMENT OF EDUCATION

Guidelines for the Title I Comparability Report

STATUTORY REQUIREMENTS

Section 1120A (c) in the Elementary and Secondary Education Act (ESEA) Comparability of Services requires that local education agencies (LEAs) be able to document that the services provided with state and local funds in Title I schools are comparable to those provided in non-Title I schools in the LEA. State and local funds must be used in participating schools to provide services that, taken as a whole, are "at least comparable" to services in schools that do not participate in the Title I program.

If a LEA serves all of its schools (*or all schools within a grade span*) with Title I funds, the LEA must use State and local funds to provide services that are substantially comparable in each Title I school.

Because Title I allocations are made annually, comparability is an ANNUAL requirement. In order for the Maryland State Department of Education (MSDE) to meet its obligations to ensure that LEAs comply with all statutory and regulatory provisions pertaining to Title I, each LEA must compile information that ensures it is complying with comparability requirements. The school system must have the following on file:

- District wide salary schedule,
- A policy ensuring equivalence among schools in teachers, administrators, and auxiliary personnel,
- A policy ensuring equivalence among schools in the provision of curriculum materials and instructional supplies, and
- Submission document (Form A, and B and C workbook **or** Form A, and D and E workbook) showing appropriate student/staff ratio **or** per pupil amount (PPA) of State and local funds between Title I and non-Title I schools.

Records must be maintained to demonstrate that comparisons across Title I and non-Title schools or all schools (if the LEA serves all with Title I funds) have been made. For any Title I school found not comparable, staff changes must be corrected **or** State or local funds to the school would need to be adjusted **before December 1**.

STATE GUIDELINES

1. What are comparability assurances?

Comparability assurances verify that a LEA has met annual comparability requirements using student/instructional staff ratios or PPA of State & local funds. This verification is documented by the submission of Comparability Report FORMS A, B, and C workbook **or** FORMS A, D and E Workbook to MSDE. Local **superintendents sign** FORM A certifying that the school system's Title I schools are comparable in terms of staff/student ratios and materials of instruction.

2. What effect do the assurances have on a LEA?

Each LEA must adopt policies in support of their comparability assurances. Compliance with the assurances will be examined as part of MSDE program reviews or audits concerning compliance. Records must be maintained to demonstrate that the assurances have been implemented. Failure to comply with the assurances is a violation of the Title I statute. The LEA's superintendent signature on FORM A confirms that to the best of his/her knowledge and belief the information is accurate and correct and that comparability policies and procedures are in place.

3. What information is contained in Comparability Policy?

- a. Documentation procedures for the development of a district-wide salary schedule
- b. Documentation procedures for ensuring equivalence among schools in teachers, administrators, and auxiliary personnel
- c. Documentation procedures for ensuring equivalence among schools in the provision of curriculum materials and instructional supplies, and
- d. A set of written procedures to ensure that comparable services are provided.

4. Who must document compliance for comparability?

All 24 LEAs in Maryland must complete an annual Comparability Report.

5. How is comparability (equivalence) determined?

The Title I statute and legislative history does not provide guidance on the meaning of the word "equivalence" as it relates to the local school district policy on equivalence among schools in regards to teachers, administrators, and auxiliary personnel (paid with State and local funds). In the absence of a statutory definition, MSDE has developed a standard comparing student/instructional staff ratios or comparing PPA of State and local funds for instruction. School

systems must complete an annual comparability status report that compares the average number of students per instructional staff in each Title I school with the average number of students per instructional staff in schools not participating in Title I. Comparability will be determined based on the number of students per staff person with a ten (10) percent allowable variance for non-Title I schools. Title I schools does not exceed the 110 percent of the average of non-Title I schools. Similarly, if an LEA is using PPA of instructional cost the average is at least 90 percent of the non-Title I schools. If all schools are Title I to meet comparability schools would need to fall between the 90 percent and the 110 percent of the average.

The comparability status report includes information on Title I and non-Title I schools. Such information must include student enrollments, number of assigned staff paid with State and local funds, and calculations of the ratio of students per instructional staff in all reported schools **or** the State and Local funds allocated, and the student enrollment and the calculations of PPA. The LEA shall select and use the same date (on or before October 1) for collecting and measuring comparability information.

The Report is made up of three FORMS in different formats:

- Form A School Information and Signature Document (WORD)
- Form B or D Title I Schools (EXCEL)*
- Form C or E Non-Title I/Comparison Schools (EXCEL)*

* FORMS B or D and C or E are provided in Excel Workbook format.

Detailed directions on the completion of each of these forms are appended to these Guidelines.

6. *When should a school system begin the process of determining comparability?*

The LEA needs to begin the process at the time school budgets are discussed. Decisions are made to allocate local and State resources well before the date LEAs tests for compliance for comparability. Title I dollars supplement the instructional program with a purpose to meet the educational needs of low-achieving children in the highest poverty schools. Title I funds cannot be “perceived “or “treated” as general funds.

7. *On what date must student enrollment and staff assignments be counted?*

Student enrollment and staff assignments must be counted on the same day. An LEA may wish to use the same date on which the official enrollment count for the county is performed – September 30th. What’s important is that the student and staff count is performed on or before October 1st. If using PPA, student count is should be the September 30th official count and the PPA reported should be the adjusted allocation to actual enrollment done early in the school year.

8. What steps should be taken to complete the Annual Report?

Each LEA receiving Title I funding must develop procedures for compliance and maintain records that documenting compliance. Please refer to the attached *Coordinator Timeline for the Completion of the Title I Comparability Report*. Complete instructions on how to fill out Excel FORMS A, B, C, D and E are attached.

9. Which schools must be included in the Comparability Report?

All Title I schools with enrollments over 100 have to be included. Non-Title I schools listed are comparison schools only, if Title I does not serve Middle or High Schools then those schools are not on the report.

All participating Title I schools must be included in the Report on FORM B or FORM D. The comparison is made between like grade spans, i.e. elementary-to-elementary, middle-to-middle, high-to-high school on FORM C or FORM E. Student/teacher ratios or PPA are calculated between Title I schools and non-Title I schools. Exceptions to this rule are outlined in questions 10 and 11.

Only public schools (including Charter schools *rev.5/08*) must be presented in this Report. *Attachment 4A of the Bridge to Excellence Master Plan Update* should have included every school in the LEA and can be used as a reference. All schools presented in the Comparability Report should have appeared on Attachment 4A (all refers to schools within the grade span served by Title I). If, by chance, your county’s Attachment 4A did not originally include all of its public schools, the Attachment should have been corrected and resubmitted to MSDE as part of the final BTE Update.

10. What does a LEA do about an eligible Title I skipped school?

If a LEA “skips” an eligible Title I attendance area that is already receiving, from nonfederal funds, services of the same nature and scope as the services that would otherwise be provided with Title I funds, it would include the attendance area as a Title I school for the purposes of completing this comparability status report. (*rev. 12/07*) The compensatory state and local funds are treated as if they were Federal funds and must be excluded in the calculation.

Special Note: for Vocational Education, Special Education, and Alternative Education Schools that are Skipped, these schools must be treated as Title I schools for the Comparability Report.

All funds that the LEA has included in Column L on its Skipped School FY 2014 Allocation Worksheet must be excluded from the Comparability calculations since the LEA has indicated that these are additional State and/or local funds.

11. How does a LEA calculate comparability when all schools in the grade span receive Title I funds?

When all Title I schools being served fall in one specific grade span or size group, the following applies:

- Title I schools with the lowest concentration of low-income children will serve as comparison schools. When there is no more than five (5) percent difference between the highest and lowest concentrated schools, any of the schools may serve as comparison schools. However, no more than 50 percent of the schools in the grade span or size group may serve as comparison schools.
- As an alternative to the above, the data averages for all the Title I schools may serve as comparison data. The district demonstrates comparability by determining whether the student/instructional ratio for each school fall within a range that is between 90 and 110 percent.
- The LEA compares the per pupil amount allocated to each school within the grade span to a range that fall within 90 and 110 percent of the per pupil average for the grade span as a whole.

12. Which students are included in the Comparability Report?

All students enrolled in Title I and the non-Title I schools must be included in the Report. Pre-K and Kindergarten students are included and their count is determined by whether or not they attend full or half-day sessions.

13. What school and student information needs to be collected and reported on FORMS B and C?

The following school information must be reported: school four-digit ID code, school name, actual grade span, number of pupils enrolled, and full-time equivalent (FTE) staff. No specific student information is reported on the Comparability Report.

14. What staff information needs to be collected and reflected on FORMS B and C?

When comparing student/instructional staff ratios, the LEA must consistently include the same staff members in the ratios for both Title I schools and the comparison non-Title I schools.

Calculate the FTE numbers of instructional staff who are paid with State and local funds that are regularly assigned to each school listed. Staff members whose full salaries are paid with federal dollars are not to be included in this report. For those staff members who are proportionally paid with federal, state and/or local dollars, count only the portion of that person's salary that is local and state funded. Enter data to the nearest tenth. **“Instructional staff” is defined as anyone who provides direct instruction to children or who assists or supervises those staff members who provide instruction.** For example, the following individuals would be considered “instructional staff”. This is not an all-inclusive list.

Principals, Vice Principals (school based administrators)	Speech Therapists
Teachers	Guidance Personnel
Resource Teachers	School Social Workers
Mentor Teachers	Parent /Family Involvement Specialist/Liaisons
Reading and Math Specialists	Librarians and Media Specialists
Physical Education, Music, and Art Teachers	Instructional Assistants/Paraprofessionals

- Long-term substitute teachers are included in the count for the Comparability Report.
- Short-term substitutes temporarily replacing a teacher on leave for maternity or surgery are not counted but the official teacher would be counted.
- Full-time substitutes under contract with the LEA and assigned to a specific school are included in the count.
- **Instructional assistants/paraprofessionals, that provide instructional support and that are full time are to be calculated as a .5 (for the purpose of this report they can only be counted at 1/2 of their actual FTE). Local Human Resources can identify paraprofessional classifications – they usually are positions not classified in the pay scales of teachers or administrators.**

Unpredictable changes in enrollment or personnel assignments that occur after the beginning of the school year need not be included as a factor in determining comparability of services (supporting documentation would be required).

15. Can any staff be excluded?

When determining compliance with comparability, a LEA, in accordance with Section 1120A (c) (5), may exclude State and local funds expended for bilingual education for limited English proficiency students and excess costs of providing services to children with disabilities as determined by the LEA.

16. What calculation assures that the Title I school meets the comparability requirements?

A Title I school is comparable if the school’s average student/teacher ratio does not exceed 110 percent of the average student/teacher ratio of schools not participating in Title I. Or the PPA is not less than 90% of the average PPA of schools not participating in Title I. For example, if the average ratio of students to instructional staff is 20 to 1 for a LEA’s non-Title I schools, the ratio at each Title I school can be no higher than 22 to 1.

EXCEL NOTE: Workbook FORMS B and C are formula driven and will calculate the 110% on FORM C in Cell 5B. Once calculated, that same number will automatically move to FORM B Cell 5B. If a school is not comparable, the formula will indicate the school is not comparable (1 “X”) in Column 6 on FORM B and will provide the system with the required FTE to make the school comparable.

17. When does a Title I school need to meet the comparability requirement? What happens if the school does not meet comparability?

All Title I funded schools in a LEA must meet the Title I “equivalence” staffing requirement

or PPA requirement by December 1 of each school year. Any Title I school not in compliance with this comparability requirement is subject to suspension and withholding of Title I funds.

Where comparability is not achieved by December 1, the LEA shall refund an amount equal to the State and local funds that the LEA should have expended for additional staff to achieve comparability from the beginning of the grant period to the date of the compliance.

In order to meet the annual compliance date of December 1, a LEA should collect the comparability report information by October 1 of each school year. This will allow the LEA sufficient time for allocation, placement, and/or realignment of staffing in Title I schools prior to December 1. *(This includes counting any instructional assistant/paraprofessional as a .5 when adding additional staffing to meet comparability.)*

18. What documentation needs to be maintained?

Each LEA shall maintain records that document compliance with the comparability requirement for three years after the grant period ends or three years after resolution of audit findings related to the grant. Maintain all supporting data including but not limited to student counts, staffing FTE, and a list of staff by name and position *(clearly identifying position titles that are paraprofessional)*. In cases where initial information indicates a LEA is out of compliance with comparability requirements, the LEA should retain documentation to demonstrate what specific actions were taken to achieve Title I comparability of service in all Title I schools.

Each LEA should maintain a list for each school's staff additions and deletions and the date of hire or transfer. Staff changes are subject to verification through written personnel action, attendance sheets, payroll records, or other suitable documentation. Equivalence among schools in the provision of curriculum materials and instructional supplies is tested by supplement not supplant provision.

19. When is the report due?

The Comparability Report (including FORMS A, B, and C or A, D and E) is **due to MSDE on December 1, 2014. This date is non-negotiable.**

20. How will the Comparability Report be reviewed by MSDE?

Refer to the attached Review Instrument for Comparability Review. Comparability will also be reviewed by the State auditors.

21. In what format and to whom must the Comparability Report be submitted?

The Comparability Report (FORMS A, B, and C or A, D and E) must be submitted in hard copy with original signatures on FORM A.

- For any schools that were not comparable using student/instructional staff ratio, submit the documentation of action taken to make the school comparable including the names of the staff and their position title *(identifying paraprofessional staff titles as applicable)* **or**

documentation of appropriate adjustment of funds if PPA is used for Comparability.

- If any schools are excluded provide the name of the school and the reason they are excluded. Remember that MSDE must be notified of schools that will not be included in the report.

FORMS A, B and C or FORMS A, D and E must be also be submitted electronically to:

Maria Lamb via her Management Associate Sharon Williamson swilliam@msde.state.md.us
and
the LEA's Title I Point of Contact.

Maria E. Lamb, Director
Program Improvement and Family Support Branch
Maryland State Department of Education
200 West Baltimore Street
Baltimore, Maryland 21201
Telephone: 410-767-0286

Coordinator Timeline for the Completion of the Title I Comparability Report

January – April

- Proactively engage in county level budget (state and local funds) discussions concerning staff assignments, equipment and material for the purpose of ensuring compliance with Title I comparability requirements.

May - July

- Conduct introductory meeting with Human Resources and LEA Finance Representatives to discuss the requirements for the completion of the upcoming Comparability Report.
- Establish participant roles and responsibilities.
- Establish county specific timelines for completion of the Report.

August:

- Obtain copy of preliminary district-wide school staffing report from Human Resources **or** budget for instructional allocation to schools (Finance Office).
- Use Attachment 4A from the LEA's BTE Master Plan as the basis for identifying Title I and non-Title I schools.

September:

- Identify date and collection methodologies for gathering data needed to complete calculations (student and staff assignment data *or* instructional allocations to schools).

October:

- Meet with Human Resources and Finance representatives to draft the Title I Comparability Report.
- Make comparability corrections immediately for all schools that are shown to be non-comparable.

November:

- Reconvene Human Resources and Finance representatives to address any outstanding issues.
- Obtain official LEA approval of report and superintendent's signature on FORM A.
- Maintain all required documentation supporting the development of the Comparability Report.

December:

- Submit official Title I Comparability Report to MSDE by December 1st (this date is non-negotiable).

FORM A

School Information and Signature Document

DIRECTIONS

Name of Local Education Agency needs to be entered.

Person Completing Report: Name the person responsible for completion of the Title I Comparability Report and provide their phone and fax numbers, and email address.

Purpose of Report: Check the appropriate box indicating the purpose for which the report was prepared.

School Information Summary: Record the number of schools by grade span and size using the following instructions.

Grade Spans: The regulations provide that comparability may be determined on a district-wide or grade-span basis. The number of grade spans should match the basic organization of schools in the LEA. For example, if a LEA has elementary schools serving all elementary grades, middle schools, and high schools, the grade span grouping would be grades A= K-5, B=6-8 and C=9-12. To the extent a LEA has schools that overlap grade spans; they should be included in that group with which it has the most grades in common. Although generally no more than three grade span groupings are to be used, a school serving 8 or more grades above K may be considered a separate group. (Example D= K-8)

In the grade span column report the grade span of the schools in this report. The determination needs to be made before FORMS: B & C, or B-1 & B-2 or D & E or D-1 & E-1 are completed.

Enrollment Size Range: After excluding all schools with enrollments of 100 or less, an LEA may divide the schools into groups of smaller and larger schools provided the largest school is at least twice as large as the smallest. For example,

Smallest School Enrollment	Largest School Enrollment	Calculation	Range	Rational Because...	Enrollment Size Range
School A 186	370	$2 \times 186 = 372$	186 - 370	The largest school population is less than two times the smallest school	All
School B 186	392	$2 \times 186 = 372$	186 to 288 & 289 to 392	The largest school population is equal to or greater than two times the smallest school.	Smaller = 186-288 Larger = 289-392

Calculation Explanation

Add the largest school's enrollment (392) and the smallest school's enrollment (186) and divide by two to find the midpoint (289). Smaller range would be the smallest school enrollment up to the midpoint (186 to 288). Larger range would be the midpoint to the largest school enrollment (289 to 392).

For example:

$392 + 186 = 578$ divided by $2 = 289$ or the midpoint
Range: 186 to 288 / 289 to 392

FORM A (Continued)

Number of Schools: Record the number of Title I and non-Title I schools in each grade span and in each group according to size range of enrollment. **Again, all Title I schools of enrollments over 100 have to be included. Non-Title I schools counted are comparison schools only. Comparisons schools listed are the same grade spans as Title I schools.** In cases where the LEA has skipped a middle or high school, those skipped schools would be considered as “Title I” for this report. LEAs would be required to compare them to non-Title I schools in the same grade span.

Required Signatures: The Title I Coordinator’s signature confirms his/her review and approval of the report. FORM A must be signed by the superintendent. His/her signature assures that the information reported is correct, Comparability policies are in place, and that all supporting documentation is maintained and available for review.

Note that the written procedures to ensure that comparable services are provided should include:

- Identification of the offices/positions responsible for comparability determination.
- Steps the LEA will take to collect, review, validate, and maintain the data.
- LEAs using student/instructional staff ratio would include definition/job titles of instructional staff counted, and identification of excludable staff.
- LEAs reporting PPA would list which funds are included to generate the PPA and which funds may be excluded (i.e. funding for ESOL service).
- Steps to make adjustments in schools that are not comparable before December 1.
- LEA validation process (check that moves/hires or funding adjustments actually occurred before Dec 1) including reporting changes to MSDE.

FORM B
TITLE I SCHOOLS
DIRECTIONS

Name of Local Education Agency needs to be entered.

Grade Span and Size: A separate FORM B must be prepared for each grouping of schools by grade span. Identify the grade span in the box provided by recording an A, B, C, or D as reported on Form A. Check the box that identifies the enrollment size range of the school group as reported on FORM A.

School Code: Enter the four-digit school code (required).

Column 1: **Names of Title I Schools:** List by name each Title I school in this grade span and enrollment size group. Insert additional rows if necessary.

EXCEL NOTE: Remember to copy formulas in the blue shaded areas if rows are added. Additional sheets will print automatically with the set headings.

Column 2: **Actual Grade Span:** Enter the grades operated in each school.

Column 3: **Pupils Enrolled:** Record the actual number of pupils enrolled in each school on the date being used for reporting. Schools with half-day Pre-K count each student as a .5 FTE. Enter data to the nearest tenth.

For Example:

Grade	Students	Calculation	Counted As
All-Day Pre-K	25	$25 \times 1 = 25$	25 students
Half-Day Pre-K	20 a.m./ 20 p.m.	$20 \times .5 = 10$ $20 \times .5 = 10$	20 students
Half-Day Pre-K	17 a.m./ 21 p.m.	$17 \times .5 = 8.5$ $21 \times .5 = 10.5$	19 students

Column 4: **FTE Staff:** Determine the full-time equivalent (FTE) number of staff members paid with State and local funds who are regularly assigned to each school listed. Pro-rate FTE staff as necessary and express the results to the nearest tenth. *Instructional assistants/paraprofessional must be calculated at 1/2 of their actual FTE.* (Staff paid from Title I funds, Migrant Education funds, and other Federal funds for which the LEA is directly accountable MUST be excluded.)

EXCEL NOTE: Do not enter data in the blue shaded areas as these columns are formula driven and will be completed automatically.

FORM B (Continued)

Column 5: **Column 3/Column 4:** Do not enter data in column five. Column five is formula driven and automatically calculates the pupils per staff ratio. (All calculations round up automatically in every column.)

Column 6: **X Designates Not Comparable:** Excel automatically calculates and will place a 1 and an “X” if the school is not comparable. After the figures have been calculated for the non-Title I / comparison schools on FORM C, the 5B calculation is automatically reported in the box at the bottom of FORM B. Box 5B will contain the number used for a comparison with the Title I schools.

Required FTE: Excel automatically calculates the required FTE needed for the LEA to be in compliance.

LEA Action: LEA needed action is reflected in the (yellow) shaded area. If the school is comparable, the REQUIRED FTE column is blank, and the REMAINING FTE REQUIRED column displays #VALUE! This designates that an action is needed in the yellow column. An “OK” should be entered to show that this school meets the comparability requirements.

If the school is not comparable, the 1 and the “X” will appear and the REQUIRED FTE is reported automatically. This REQUIRED FTE will appear in the REMAINING FTE REQUIRED column until the system has made the correction in the Title I school. Supporting documentation (written personnel action) that the action has taken place before December 1 must be maintained. The LEA should enter an FTE number in the LEA ACTION column indicating that corrective action has been taken to make the school comparable. Position information, for the action taken needs to be submitted with the report.

Remaining FTE Required: Excel automatically calculates this item based on the REQUIRED FTE and the LEA action.

FORM C
NON-TITLE I /COMPARISON SCHOOLS
DIRECTIONS

Name of Local Education Agency needs to be entered.

Grade Span and Size: A separate FORM C is to be prepared for each grouping of schools by grade span. Identify the grade span in the box provided by recording an A, B, C, or D as reported on Form A. Check the box that identifies the enrollment size range of the school group as reported on FORM A.

School Code: Enter the four-digit school code (required).

Column 1: **Name of Non-Title I Schools:** List by name each non-Title I school in this grade span and enrollment size group. Insert additional rows as necessary.

EXCEL NOTE: Remember to copy formulas in the blue shaded areas if rows are added. Additional sheets will print automatically with the set headings.

Column 2: **Actual Grade Span:** Enter the grades operated in each school.

Column 3: **Pupils Enrolled:** Record the actual number of pupils enrolled in each school on the date being used for reporting. Schools with half-day Pre-K count each student as a .5 FTE. Enter data to the nearest tenth.

Column 4: **FTE Staff:** Determine the full-time equivalent number of staff members paid with State and local funds who are regularly assigned to each school listed. Pro-rate FTE staff as necessary and express the results to the nearest tenth. *Instructional assistants/paraprofessionals must be calculated at ½ of their actual FTE.* (Staff paid from Title I funds, Migrant Education funds, and other Federal funds for which the LEA is directly accountable MUST be excluded.)

EXCEL NOTE: Do not enter data in the blue shaded areas, as these columns are formula driven and will be completed automatically.

Column 5: **Column 3 / Column 4:** Column 5 is formula driven and automatically calculates the pupils per staff ratio and places the average in Cell 5A.

Calculation of 5B: Excel will calculate the formula (Cell 5A X 110%) automatically and enter the amount in Cell 5B to the nearest tenth. The number is then automatically transferred to FORM B in the Cell marked 5B.

FORM D
TITLE I SCHOOLS
DIRECTIONS

Name of Local Education Agency needs to be entered.

Grade Span and Size: A separate FORM D must be prepared for each grouping of schools by grade span. Identify the grade span in the box provided by recording an A, B, C, or D as reported on Form A. Check the box that identifies the enrollment size range of the school group as reported on FORM A.

School Code: Enter the four-digit school code (required).

Column 1: **Names of Title I Schools:** List by name each Title I school in this grade span and enrollment size group. Insert additional rows if necessary.

EXCEL NOTE: Remember to copy formulas in the blue shaded areas if rows are added. Additional sheets will print automatically with the set headings.

Column 2: **Actual Grade Span:** Enter the grades operated in each school.

Column 3: **State and Local Funds Allocated:** Total amount of state and local funds allocated for instruction (exclude all federal funds or compensatory funds if a skipped school)

Column 4: **Total Pupils Enrolled:** Record the actual number of pupils enrolled in each school on the date being used for reporting. Schools with half-day Pre-K count each student as a .5 FTE. Enter data to the nearest tenth.

For Example:

Grade	Students	Calculation	Counted As
All-Day Pre-K	25	$25 \times 1 = 25$	25 students
Half-Day Pre-K	20 a.m./ 20 p.m.	$20 \times .5 = 10$ $20 \times .5 = 10$	20 students
Half-Day Pre-K	17 a.m./ 21 p.m.	$17 \times .5 = 8.5$ $21 \times .5 = 10.5$	19 students

EXCEL NOTE: Do not enter data in the blue shaded areas as these columns are formula driven and will be completed automatically.

FORM D (Continued)

Column 5: **Column 3/Column 4:** Do not enter data in column five. Column five is formula driven and automatically calculates a per pupil allocation. (All calculations round up automatically in every column.)

Column 6: **X Designates Not Comparable:** Excel automatically calculates and will place a 1 and an “X” if the school is not comparable. After the figures have been calculated for the non-Title I / comparison schools on FORM E, the 5B calculation is automatically reported in the box at the bottom of FORM D. Box 5B will contain the amount used for a comparison with the Title I schools.

Required Funds: Excel automatically calculates the required PPA needed for the LEA to be in compliance.

LEA Action: LEA needed action is reflected in the (yellow) shaded area. If the school is comparable, the REQUIRED \$\$\$ column is blank, and the REMAINING \$\$\$ REQUIRED column displays #VALUE! This designates that an action is needed in the yellow column. An “OK” should be entered to show that this school meets the comparability requirements.

If the school is not comparable, the 1 and the “X” will appear and the REQUIRED Funds are reported automatically. This REQUIRED amount will appear in the REMAINING \$\$\$ REQUIRED column until the system has made the correction in the Title I school. Supporting documentation that the action has taken place before December 1 must be maintained. The LEA should enter the dollar amount in the LEA ACTION column indicating that corrective action has been taken to make the school comparable. Fiscal action(s) taken must to be submitted with the report.

Remaining \$\$\$ Required: Excel automatically calculates this item based on the REQUIRED \$\$\$ and the LEA action.

FORM E
NON-TITLE I /COMPARISON SCHOOLS
DIRECTIONS

Name of Local Education Agency needs to be entered.

Grade Span and Size: A separate FORM E is to be prepared for each grouping of schools by grade span. Identify the grade span in the box provided by recording an A, B, C, or D as reported on Form A. Check the box that identifies the enrollment size range of the school group as reported on FORM A.

School Code: Enter the four-digit school code (required).

Column 1: **Name of Non-Title I Schools:** List by name each non-Title I school in this grade span and enrollment size group. Insert additional rows as necessary.

EXCEL NOTE: Remember to copy formulas in the blue shaded areas if rows are added. Additional sheets will print automatically with the set headings.

Column 2: **Actual Grade Span:** Enter the grades operated in each school.

Column 3: **State and Local Funds Allocated:** Total amount of State and Local funds allocated for instruction (exclude all federal funds)

Column 4: **Pupils Enrolled:** Record the actual number of pupils enrolled in each school on the date being used for reporting. Schools with half-day Pre-K count each student as a .5 FTE. Enter data to the nearest tenth.

EXCEL NOTE: Do not enter data in the blue shaded areas, as these columns are formula driven and will be completed automatically.

Column 5: **Column 3 / Column 4:** Column 5 is formula driven and automatically calculates the PPA and places the average in Cell 5A.

Calculation of 5B: Excel will calculate the formula (Cell 5A X 90%) automatically and enter the amount in Cell 5B to the nearest tenth. The number is then automatically transferred to FORM D in the Cell marked 5B.

FORM B-1 (Use only if all schools in a grade span are Title I funded.)

TITLE I SCHOOLS

DIRECTIONS

Name of Local Education Agency needs to be entered.

Grade Span and Size: A separate FORM B-1 must be prepared for each grouping of schools by grade span. Identify the grade span in the box provided by recording an A, B, C, or D as reported on Form A. Check the box that identifies the enrollment size range of the school group as reported on FORM A.

School Code: Enter the four-digit school code (required).

Column 1: **Names of Title I Schools:** List by name each Title I school in this grade span and enrollment size group. Insert additional rows if necessary.

EXCEL NOTE: Remember to copy formulas in the blue shaded areas if rows are added. Additional sheets will print automatically with the set headings.

Column 2: **Actual Grade Span:** Enter the grades operated in each school.

Column 3: **Pupils Enrolled:** Record the actual number of pupils enrolled in each school on the date being used for reporting. Schools with half-day Pre-K count each student as a .5 FTE. Enter data to the nearest tenth.

For Example:

Grade	Students	Calculation	Counted As
All-Day Pre-K	25	$25 \times 1 = 25$	25 students
Half-Day Pre-K	20 a.m./ 20 p.m.	$20 \times .5 = 10$ $20 \times .5 = 10$	20 students
Half-Day Pre-K	17 a.m./ 21 p.m.	$17 \times .5 = 8.5$ $21 \times .5 = 10.5$	19 students

Column 4: **FTE Staff:** Determine the full-time equivalent (FTE) number of staff members paid with State and local funds who are regularly assigned to each school listed. Pro-rate FTE staff as necessary and express the results to the nearest tenth. *Instructional assistants/paraprofessional must be calculated at 1/2 of their actual FTE.* (Staff paid from Title I funds, Migrant Education funds, and other Federal funds for which the LEA is directly accountable MUST be excluded.)

EXCEL NOTE: Do not enter data in the blue shaded areas as these columns are formula driven and will be completed automatically.

FORM B-1 (Continued)

Column 5: **Column 3/Column 4:** Do not enter data in column five. Column five is formula driven and automatically calculates the pupils per staff ratio. (All calculations round up automatically in every column.)

Column 6: **X Designates Not Comparable:** Excel automatically calculates and will place a 1 and an “X” if the school is not comparable. After the figures have been calculated for the Title I / comparison schools on FORM C-1, the 5B and 5C calculation is automatically reported in the box at the bottom of FORM B-1. Box 5B and 5C will contain the number used for a comparison with the Title I schools.

Required FTE: Excel automatically calculates the required FTE needed for the LEA to be in compliance.

LEA Action: LEA needed action is reflected in the (yellow) shaded area. If the school is comparable, the REQUIRED FTE column is blank, and the REMAINING FTE REQUIRED column displays #VALUE! This designates that an action is needed in the yellow column. An “OK” should be entered to show that this school meets the comparability requirements.

If the school is not comparable, the 1 and the “X” will appear and the REQUIRED FTE is reported automatically. This REQUIRED FTE will appear in the REMAINING FTE REQUIRED column until the system has made the correction in the Title I school. Supporting documentation (written personnel action) that the action has taken place before December 1 must be maintained. The LEA should enter an FTE number in the LEA ACTION column indicating that corrective action has been taken to make the school comparable. Position information, for the action taken needs to be submitted with the report.

Remaining FTE Required: Excel automatically calculates this item based on the REQUIRED FTE and the LEA action.

FORM C-1 (Use only if all schools in a grade span are Title I funded.)

TITLE I /COMPARISON SCHOOLS

DIRECTIONS

Name of Local Education Agency needs to be entered.

Grade Span and Size: A separate FORM C-1 is to be prepared for each grouping of schools by grade span. Identify the grade span in the box provided by recording an A, B, C, or D as reported on Form A. Check the box that identifies the enrollment size range of the school group as reported on FORM A.

School Code: Enter the four-digit school code (required).

Column 1: **Name of Title I Schools:** List by name each Title I school in this grade span and enrollment size group. Insert additional rows as necessary.

EXCEL NOTE: Remember to copy formulas in the blue shaded areas if rows are added. Additional sheets will print automatically with the set headings.

Column 2: **Actual Grade Span:** Enter the grades operated in each school.

Column 3: **Pupils Enrolled:** Record the actual number of pupils enrolled in each school on the date being used for reporting. Schools with half-day Pre-K count each student as a .5 FTE. Enter data to the nearest tenth.

Column 4: **FTE Staff:** Determine the full-time equivalent number of staff members paid with State and local funds who are regularly assigned to each school listed. Pro-rate FTE staff as necessary and express the results to the nearest tenth. *Instructional assistants/paraprofessionals must be calculated at 1/2 of their actual FTE.* (Staff paid from Title I funds, Migrant Education funds, and other Federal funds for which the LEA is directly accountable MUST be excluded.)

EXCEL NOTE: Do not enter data in the blue shaded areas, as these columns are formula driven and will be completed automatically.

Column 5: **Column 3 / Column 4:** Column 5 is formula driven and automatically calculates the pupils per staff ratio and places the average in Cell 5A.

Calculation of 5B and 5C: Excel will calculate the formula (Cell 5A X 90%) automatically and enter the amount in Cell 5B to the nearest tenth and calculate (Cell 5A X110%) and enter the amount in Cell 5C The number is then automatically transferred to FORM B-1 in the Cell marked 5B and 5C.

FORM D-1 (Use only if all schools in a grade span are Title I funded.)

TITLE I SCHOOLS

DIRECTIONS

Name of Local Education Agency needs to be entered.

Grade Span and Size: A separate FORM D-1 must be prepared for each grouping of schools by grade span. Identify the grade span in the box provided by recording an A, B, C, or D as reported on Form A. Check the box that identifies the enrollment size range of the school group as reported on FORM A.

School Code: Enter the four-digit school code (required).

Column 1: **Names of Title I Schools:** List by name each Title I school in this grade span and enrollment size group. Insert additional rows if necessary.

EXCEL NOTE: Remember to copy formulas in the blue shaded areas if rows are added. Additional sheets will print automatically with the set headings.

Column 2: **Actual Grade Span:** Enter the grades operated in each school.

Column 3: **State and Local Funds Allocated:** Total amount of state and local funds allocated for instruction (exclude all federal funds or compensatory funds if a skipped school)

Column 4: **Total Pupils Enrolled:** Record the actual number of pupils enrolled in each school on the date being used for reporting. Schools with half-day Pre-K count each student as a .5 FTE. Enter data to the nearest tenth.

For Example:

Grade	Students	Calculation	Counted As
All-Day Pre-K	25	$25 \times 1 = 25$	25 students
Half-Day Pre-K	20 a.m./ 20 p.m.	$20 \times .5 = 10$ $20 \times .5 = 10$	20 students
Half-Day Pre-K	17 a.m./ 21 p.m.	$17 \times .5 = 8.5$ $21 \times .5 = 10.5$	19 students

EXCEL NOTE: Do not enter data in the blue shaded areas as these columns are formula driven and will be completed automatically.

FORM D-1 (Continued)

Column 5: **Column 3/Column 4:** Do not enter data in column five. Column five is formula driven and automatically calculates a per pupil allocation. (All calculations round up automatically in every column.)

Column 6: **X Designates Not Comparable:** Excel automatically calculates and will place a 1 and an “X” if the school is not comparable. After the figures have been calculated for the Title I / comparison schools on FORM E-1, the 5B and 5C calculation is automatically reported in the box at the bottom of FORM D-1. Box 5B and 5C will contain the amount used for a comparison with the Title I schools.

Required Funds: Excel automatically calculates the required PPA needed for the LEA to be in compliance.

LEA Action: LEA needed action is reflected in the (yellow) shaded area. If the school is comparable, the REQUIRED \$\$\$ column is blank, and the REMAINING \$\$\$ REQUIRED column displays #VALUE! This designates that an action is needed in the yellow column. An “OK” should be entered to show that this school meets the comparability requirements.

If the school is not comparable, the 1 and the “X” will appear and the REQUIRED Funds are reported automatically. This REQUIRED amount will appear in the REMAINING \$\$\$ REQUIRED column until the system has made the correction in the Title I school. Supporting documentation that the action has taken place before December 1 must be maintained. The LEA should enter the dollar amount in the LEA ACTION column indicating that corrective action has been taken to make the school comparable (increase or decrease funds). Fiscal action(s) taken must to be submitted with the report.

Remaining \$\$\$ Required: Excel automatically calculates this item based on the REQUIRED \$\$\$ and the LEA action.

FORM E-1 (Use only if all schools in a grade span are Title I funded.)

TITLE I /COMPARISON SCHOOLS

DIRECTIONS

Name of Local Education Agency needs to be entered.

Grade Span and Size: A separate FORM E-1 is to be prepared for each grouping of schools by grade span. Identify the grade span in the box provided by recording an A, B, C, or D as reported on Form A. Check the box that identifies the enrollment size range of the school group as reported on FORM A.

School Code: Enter the four-digit school code (required).

Column 1: **Name of Title I Schools:** List by name each Title I school in this grade span and enrollment size group. Insert additional rows as necessary.

EXCEL NOTE: Remember to copy formulas in the blue shaded areas if rows are added. Additional sheets will print automatically with the set headings.

Column 2: **Actual Grade Span:** Enter the grades operated in each school.

Column 3: **State and Local Funds Allocated:** Total amount of State and Local funds allocated for instruction (exclude all federal funds)

Column 4: **Pupils Enrolled:** Record the actual number of pupils enrolled in each school on the date being used for reporting. Schools with half-day Pre-K count each student as a .5 FTE. Enter data to the nearest tenth.

EXCEL NOTE: Do not enter data in the blue shaded areas, as these columns are formula driven and will be completed automatically.

Column 5: **Column 3 / Column 4:** Column 5 is formula driven and automatically calculates the PPA and places the average in Cell 5A.

Calculation of 5B and 5C: Excel will calculate the formula (Cell 5A X 90%) automatically and enter the amount in Cell 5B to the nearest tenth and calculate (Cell 5A X110%) and enter the amount in Cell 5C The number is then automatically transferred to FORM D-1 in the Cell marked 5B and 5C.