

FY10 Title I Budget Workbook Instructions

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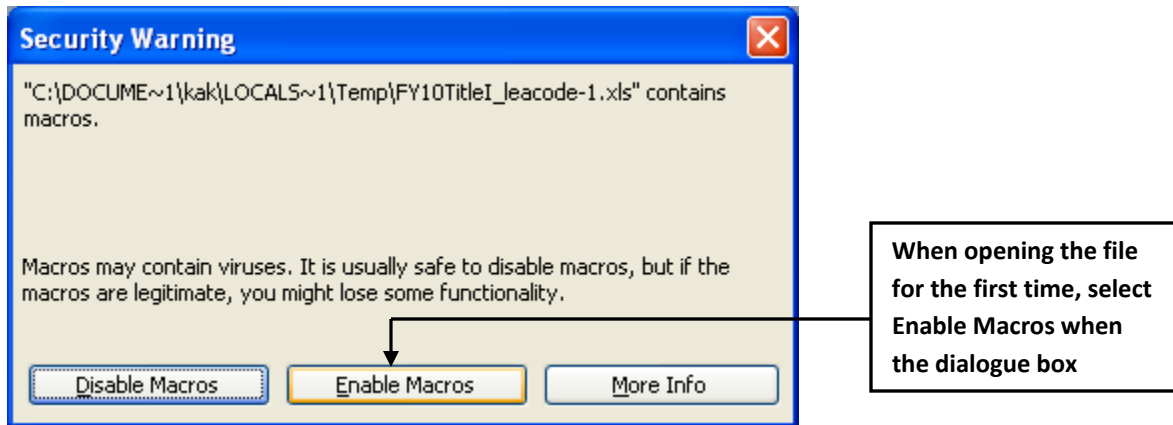
This Excel workbook contains the Title I-specific forms that a school district must submit to the Massachusetts Department of Elementary and Secondary Education in support of the district's application for Title I, Part A funds for FY10.

For questions concerning the submission process, please contact us via phone (781) 338-6230 or e-mail: titlei@doe.mass.edu

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The FY10 Title I Budget Workbook a Microsoft Excel file (*.xls) which includes macros that enable the workbook to compute totals and summary tables.

- Users of Microsoft Office 2000/2003 may need to **change your security settings in Excel** before opening the file: In Excel, select **Tools > Macro > Security**. When the dialogue box appears, change the security settings to **Medium** and click **OK**. Reopen the file.
- Users of Microsoft Office 2007 must save the Budget Workbook in an earlier version of Excel (*.xls not *.xlsx). In Excel, select **File > Save As > Save as type: Microsoft Excel 97-Excel 2003 & 5.0/95 Workbook (*.xls)**.



Obtaining the Budget Workbook Online [\[Back to Top\]](#)

The FY10 Title I Budget Workbook is available for download from the Department’s FY10 ARRA, NCLB and IDEA Grant Applications website at www.doe.mass.edu/nclb/grant/.

1. Browse to the section entitled **FY10 No Child Left Behind Act (NCLB)**
2. Locate the Excel icon entitled, **Title I Budget Workbook (Fund Code 305)**
3. Right-Click the Excel icon and select **Save As**
4. **Save** the file to your computer
5. **Rename the file by replacing the words “leacode” in the filename** with your 4-digit district code. For example, Abington (0001) would rename the file as “FY10TitleI_0001.xls.”

IMPORTANT: Do not change the filename except for your districts 4-digit code.

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The FY10 Title I Budget Workbook contains 10 worksheet tabs. Some of these tabs will be familiar to users of the FY09 Title I Budget Workbook; others are new or are modified:

1. **Table of Contents (NEW):** Information about Title I purpose, priorities, use of funds, how to use the workbook, and links that allow you to access individual worksheets in the workbook.

TIP: Access individual worksheet tabs by using the Table of Contents on the Main Page or by clicking on the appropriate grey tab at the bottom of the screen.

2. **CoverSheet:** Standard budget coversheet. Select your district's name from the drop-down list and click the "Continue" button. Enter your contact information, including a summer telephone number/email address, and your district's FY10 Title I, Part A allocation amount (Cell P14)

3. **T1 Form 1:** Used to identify eligible Title I schools, qualify school attendance areas, select eligible Title I schools, and allocate funds to eligible Title I schools.
4. **T1 Form 2:** Used to reserve funds prior to school allocations.
5. **Activity 1, 2, 3, etc. (NEW):** Used to describe your district's uses of Title I, Part A funds and related budget information.
6. **Budget Page:** Combined total budget derived from budget information you entered on one or more worksheets based on your district's proposed activities. This information will transfer automatically to the Budget Page to create a combined total budget.
7. **Amendment:** Standards Amendment Request Form (Form AM 1)
8. **Schedule A:** Used if your organization operated and administers a grant project using funds assigned to more than one agency. Fill in the name of each participating agency; include LEA code and amount of assigned funds. Print the Schedule A Worksheet and obtain authorized signatures. A signed original must be mailed to:

Melissa T. Williams, Title I Grants Specialist, School Improvement Grant Programs
Massachusetts Department of Elementary and Secondary Education
75 Pleasant Street, Malden, MA 02148-4906
9. **Summary:** Summarizes your district's proposed allocation of funds across line items and activities. When the activities and budget are complete, the primary contact person should review this tab. This tab is for reference purposes only and contains 3 reports that summarize the data entered on the budget worksheets. You cannot enter data on this worksheet.
10. **Indirect Cost Calculator:** Automatically calculates the amount of funds that can be used by a school district for indirect costs. Your district's indirect cost rate can be found under the second bullet in the School Business Services Information at <http://finance1.doe.mass.edu/Grants/>.

NOTE: Charter schools must apply for an indirect rate each year and should consult with the charter school's business office for updated information.

Step One – Before You Begin [\[Back to Top\]](#)

1. After completing your district's needs assessment and planning process, including analysis of student achievement data, **gather such information** as the district's Title I allocation, school and district accountability status, data on school-age children, including low-income children who reside in Title I-served school attendance areas in the district but are not attending public schools, and information on the Title I funds the district will reserve prior to calculating school-level allocations (reservations that are required and those that are optional).

2. **Access the detailed instructions regarding Title I Forms 1 and 2**, which are used for reserving funds and selecting and allocating funds to eligible schools, and detailed grant submission instructions at www.doe.mass.edu/nclb/grant.

Step Two - Cover Sheet [\[Back to Top\]](#)

1. Access the **Cover Sheet** by clicking the link in the **Table of Contents** or the appropriate tab at the bottom of the workbook.

Name of Grant Program: Title I, Part A	Fund Code: 305
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Overview | [Table of Contents](#)

Title I Purpose:
Title I, as reauthorized under the No Child Left Behind Act of 2001, provides resources to local school districts to assist low achieving students in high poverty schools to meet the state's challenging academic standards.

Title I Priorities:
The priorities of Title I are to:
1. strengthen the core program in schools and provide academic enrichment services to low achieving students at the preschool, elementary...

2. **Select your district's name** from the drop-down list and click **Continue**.

IMPORTANT: You must click **Continue** in order for the budget workbook to populate with the relevant information and data for your district.

3. Enter your **contact information**, including a summer telephone number/email address.
4. Enter your district's FY10 Title I, Part A **allocation amount** (Cell P14). You cannot enter any information in the shaded **Total Amount Requested** cell. This cell is password protected and will automatically display the total amount of funds being applied for once you begin entering budget information on other worksheets.

NOTE: Access your district's Title I, Part A allocation by clicking the link entitled "FY10 ARRA, IDEA and NCLB Allocation Amounts" at www.doe.mass.edu/nclb/grant/.

Select the name of your organization from the drop-down and click the Continue button. The file will automatically populate with information and data for your district.

MASSACHUSETTS DEPARTMENT OF ELEMENTARY AND SECONDARY EDUCATION
Cover Sheet: Title I, Part A
Select District/Organization Name and click "Continue" button.

PART I - GENERAL

A. APPLICANT

District Name: ORGANIZATION NAME District Code: ORGA

Coordinator Name: _____ Email: _____

Address: ADDRESS LINE 1 _____

ADDRESS LINE 2 _____

CITY/TOWN: _____ MA ZIP CODE: _____

Contact Tel: _____ Summer #: _____ Submission date: _____

B. APPLICATION FOR PROGRAM FUNDING

Fund Code	Program Name	PROJECT DURATION		Total Allocation (Enter allocation amount below)
		FROM:	TO:	
305	Title I, Part A Grant	9/1/2009 or Upon Approval	8/31/2010	
TOTAL AMOUNT REQUESTED:				
<i>This amount is linked to the grand total on the budget page and cannot be edited here.</i>				

C. I CERTIFY THAT THE INFORMATION CONTAINED IN THIS APPLICATION IS CORRECT AND COMPLETE; THAT THE APPLICANT AGENCY HAS AUTHORIZED ME, AS ITS REPRESENTATIVE, TO FILE THIS APPLICATION; AND THAT I UNDERSTAND THAT FOR ANY FUNDS RECEIVED THROUGH THIS APPLICATION THE AGENCY AGREES TO COMPLY WITH ALL APPLICATION STATE AND FEDERAL GRANT REQUIREMENTS COVERING BOTH THE PROGRAMMATIC AND FISCAL ADMINISTRATION OF GRANT FUNDS

AUTHORIZED SIGNATORY: _____ TITLE: _____

TYPED NAME: _____ DATE: _____

REQUESTED SUBMISSION DUE: Per Completion of Each Grant
Mail two (2) copies of this cover sheet each with an original signature of the Superintendent/Executive Director to:
Melissa T. Williams

Complete all highlighted sections, including your district's total FY10 Title I allocation.

The Total Amount Requested field populates automatically when you add funds to your budget.

Step Three – Forms 1 and 2 [\[Back to Top\]](#)

Districts must use Title I funds in accordance with Title I, Part A rules and regulations, including the requirements that certain funds be reserved (set aside) and that districts identify Title I-eligible schools and allocate funds to those schools. **Forms 1 and 2** are used for these purposes, and can be accessed by clicking the link in the Table of Contents or the appropriate tab at the bottom of the workbook. Refer to the detailed instructions regarding Title I Forms 1 and 2 at <http://www.doe.mass.edu/nclb/grant> before beginning.

Step Four - Describe Activities [\[Back to Top\]](#)

After determining Title I school eligibility, school-level allocation amounts, and reservation amounts, you are ready to **describe your district's uses of Title I, Part A funds**. New for FY10, you will classify your district's Title I activities according to one or more of the following five categories: *Educator Quality and Effectiveness, Support and Intervention, Assessment and Data Systems, College and Career Readiness, or Other (including grant administration)*.

NOTE: The total number of activities you describe will be determined in part by the size of your district's Title I allocation and the range of activities you propose to fund. Your district is not required to fund activities in every category, and you may fund more than one activity in a particular category.

1. Begin describing your first activity or activities by clicking the link in the Table of Contents or the tab entitled **Activity 1** at the bottom of the workbook. The worksheet contains a spending summary and detailed guidance to help you provide the required narrative and budget information associated with the activity(ies) you are describing.

Select a category for your activity, give it a brief title, and respond to the narrative questions for each activity in the spaces provided.

Activity Category: Educator Quality and Effectiveness

Activities funded under this category are designed to result in improved teaching and learning for all students through the professional development of teachers, para-educators, administrators, and other personnel who work with Title I eligible students.

Long term goals under this priority may include:

- Increase the quality and effectiveness of curriculum delivery, instructional practice, and data use amongst educators working with Title I eligible students
- Increase the number of qualified and effective educators in Title I schools, particularly in high need districts

REQUIRED PROGRAM INFORMATION - NARRATIVE COMPONENT

Describe a proposed activity or set of related activities below. Begin by giving the activity(ies) a brief name, then respond to each numbered item. Describe additional activities that fall within different Activity Categories on separate worksheets (details below).

Activity Name: (5 words or less)

1. Describe the activity(ies) and explain how the activity(ies) will supplement (be in addition to) activities that the district would otherwise support through state or local funds.

Each activity contains its own spending summary to help you provide the required budget information associated with the activity(ies) you are describing.

Details about the activity category you selected will display in the space below the drop-down menu.

REQUIRED PROGRAM INFORMATION - ALLOCATION OF FUNDS

ALLOCATION OF FUNDS	# of staff	FTE	MTRS	Amount	Select a Primary Function
1 ADMINISTRATORS:					
Supervisor/Director			<input type="checkbox"/>		
Project Coordinator			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
Stipends			<input type="checkbox"/>		
			<input type="checkbox"/>		

- When you are finished describing your first activity(ies), you may **add additional activities**, as needed, by clicking the button at the bottom of the Activity worksheet that adds extra worksheet tabs for additional activities (see below). You can create up to 10 different worksheet tabs for activities.

CLICK HERE TO ADD WORKSHEETS FOR ADDITIONAL TITLE I ACTIVITIES

TABLE OF CONTENTS / CoverSheet / T1 Form 1 / T1 Form 2 / Activity 1 / Activity 2 / **Activity 3** / Budget Page / Amend

NOTE: The line item information you enter across all of these worksheets will be combined and automatically populate the worksheet labeled **Budget Page**.

Step Five - Check Budget Page [\[Back to Top\]](#)

In Step Four you entered budget information on one or more worksheets based on your district's proposed activities. This information will transfer automatically to the Budget Page to create a combined total budget. While you cannot change most details on the Budget Page, in this step you should **ensure that the details from your activity worksheet(s) are accurately represented in the budget**. If applicable, you can enter the indirect costs directly on the Budget Page. The contact information (name, telephone number, email address) you provided on the Cover Sheet is displayed at the top of the page.

NOTE: Make sure that the total amount requested (displayed at the bottom of the budget page) is equal to or less than the FY10 Title I allocation amount you entered on the Cover Sheet.

Step Six - Submit Grant Application [\[Back to Top\]](#)

After doing a final check of all completed worksheets, you should be ready to submit your district's FY10 Title I, Part A grant application.

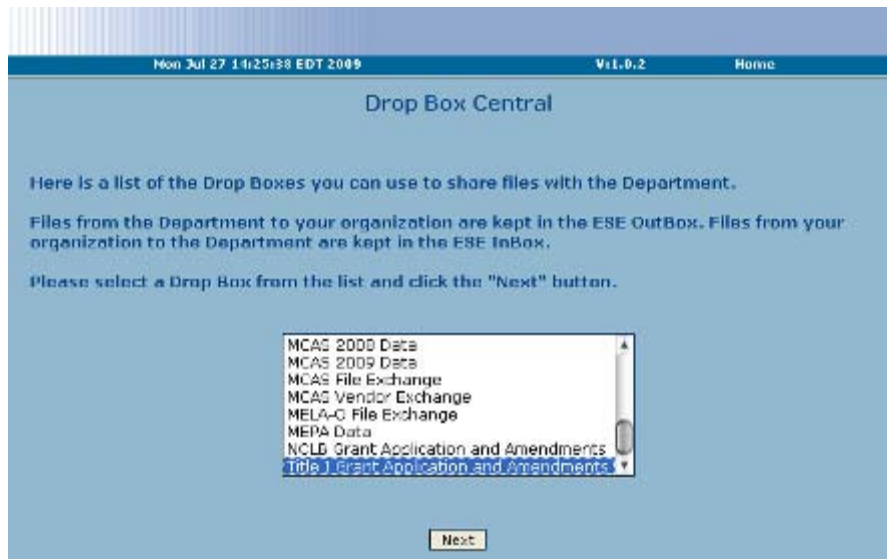
- Mail** two signed copies of the Cover Sheet with an original signature of the Superintendent/Executive Director to:

Melissa T. Williams, Title I Grants Specialist, School Improvement Grant Programs
Massachusetts Department of Elementary and Secondary Education
75 Pleasant Street, Malden, MA 02148-4906

- Upload** the FY10 Title I Budget Workbook to the ESE Security Portal. The destination folder is entitled Title I Grant and Amendments, located in **Drop Box Central**

NOTE: Each district's Directory Administrator has the authority to assign specific "roles" that allows people to access resources on the Security Portal. A complete list of Directory Administrators is available at www.doe.mass.edu/infoservices/data/diradmin/list.asp.

- a. Login to the ESE Security Portal at <https://www4.doemass.org/auth/Login>
- b. From the list of applications (links), select **DropBox Central**
- c. Scroll to the Drop Box entitled **Title I Grant Application and Amendments** and click **Next** (see below)



- d. Select the name of your organization and click **Next**
- e. You are now in the **Title I Grant Application and Amendments Drop Box**, where you can upload your grant application.

IMPORTANT: Rename the file by replacing the words "leacode" in the filename with your 4-digit district code. For example, Abington (0001) would rename the file, "FY10TitleI_0001.xls." **Do not change the filename except for your districts 4-digit code.**

- f. The Drop Box will only accept filenames with the extensions ***.doc** and ***.xls** (Microsoft Word and Excel, respectively).

Title I Grant Application and Amendments

Title I Grant Application and Amendments

Zoom

To upload a file :

1. Click the "Browse" button
2. Select the file to upload (ESE OutBox)
3. Click the "Upload File" button

Valid file extensions: *.xls, .doc*

EXPAND ALL

CLOSE ALL

- TITLE_I_GRANT \ Acton \ ESE OutBox
- TITLE_I_GRANT \ Acton \ ESE InBox

Follow the on-screen instructions to upload a file.

- g. When the file is uploaded, a **Success!** message will tell you if your upload was successful. You will also see the file appear under **Title I \District Name\ESE Inbox** along with the date and time of transmittal. The Department will be notified via email that a file has been uploaded and is ready for review.

TIP: To view all of the files in your Inbox or Outbox, click **Expand All**

- h. Click **Logout** to exit the Security Portal.

For questions concerning the submission process, please contact us via phone (781) 338-6230 or e-mail: titlei@doe.mass.edu

Step Seven – Amend the Grant [\[Back to Top\]](#)

Grant amendments are required when there is:

- a significant change in program objectives; or
- an increase or decrease in the total amount of grant; or
- an increase in a line of the budget that exceeds \$100 or 10 percent of the line (whichever is greater), or exceeds \$10,000.

To amend the budget workbook:

1. Make relevant changes to the grant application narrative and budget:

- a. Retrieve your approved budget workbook from the Department's Security Portal.
 - b. Click on the worksheet(s) for the activity or activities that you would like to amend and modify the narrative and budget details as appropriate.
 - i. Narrative: Make changes to narrative responses to questions by adding new text after your original text. Begin the amended narrative with "[Date] **Amendment:**"
 - ii. Budget: Make budgetary changes to the budget section below the narrative section.
2. Make changes to Forms 1 and 2:
 - a. If the amendment results in changes to school allocation amounts on Form 1 or district set-aside amounts on Form 2, revise these forms within the workbook.
 3. Fill-out the amendment form.
 - a. Click on the amendment tab of the application workbook to open the amendment form.
 - b. Complete the contact information in the yellow boxes.
 - c. In the justification section, provide a description of the activities of the grant and line items of the budget that are being changed.
 - d. Complete the signature section on the second page (yellow boxes).
 4. Submit the amendment:
 - a. Save the file by changing "Final" to "AM1" to read, "FY10TitleI_LEA_AM1.xls".
 - b. Print the amendment tab, have it signed by the Superintendent or designee and mail it to the address noted in Part 1, Section C.
 - c. Upload the entire workbook to the Title I Grant Application and Amendment drop box in the security portal.

Please note: When amending a grant to reallocate the 20% School Choice transportation and/or Supplemental Educational Services (SES) required set-aside amount, the following stipulations must first be met:

- a minimum of two enrollment windows must be offered at separate points in the school year that are of sufficient length to enable parents of eligible students to make informed decisions about the options offered, and
- amendments that reallocate School Choice transportation/SES reserved funds will not be approved by the Department before mid-December.

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