

# Private Schools' Handbook

## 2023-2024

Title II: Supporting Effective  
Instruction

Title IV: Student Support and  
Academic Enrichment

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## Overview

Title II: Supporting Effective Instruction	Title IV: Student Support and Academic Enrichment
<u>Purpose:</u> <ul style="list-style-type: none"><li>• Increase student achievement consistent with the challenging State academic standards</li><li>• Improve the quality and effectiveness of teachers, principals and other school leaders</li><li>• Increase the number of teachers, principals, and other school leaders who are effective in improving student academic achievement in schools</li><li>• Provide low-income and minority students greater access to effective teachers, principals and other school leaders.</li></ul>	<u>Purpose:</u> <ul style="list-style-type: none"><li>• Provide students with access to a well-rounded education.</li><li>• Improve safe and healthy school conditions for student learning.</li><li>• Improve the use of technology in order to improve the academic achievement and digital literacy of all students.</li></ul>

Professional development activities and other activities supported with Title II or Title IV funds must be **in addition to, not in place of**, what the school would otherwise provide. It would be supplanting to use Special funds to provide services or resources a private school should provide in the absence of Special funds.

### Private School Participation in Title II and Title IV

School districts are required to provide educational services and other benefits for private school children, teachers and other educational personnel, equitable in comparison to services and other benefits for public school children, teachers and other educational personnel, pursuant to section 8501(a)(3)(A) of the Elementary and Secondary Education Act (ESEA), amended by the Every Student Succeeds Act of 2015 (ESSA). Private schools must hold non-profit status in order to be eligible to receive funds.

## **Notification**

The Elementary and Secondary Education Act (ESEA), amended by the Every Student Succeeds Act of 2015 (ESSA), requires that school districts contact appropriate officials of all private schools within the geographic boundaries of the district annually to determine if they want their teachers to participate in available Special education programs, regardless of whether or not those officials have recently indicated any interest in program participation. To provide the opportunity for a school to take part in the annual needs assessment before allocations are made available in the next fiscal year, letters should be mailed in the current fiscal year. The district must include private schools that wish to participate in Special education programs in the needs assessment, planning, participation and evaluation of professional learning activities.

## **Intent to Participate**

Intent to Participate forms are sent to private schools annually, during the month of December. Included with this form is a request to update the schools' eligibility information for participation in Special programs. This will include:

- a written affirmative action policy, or description of standing practices, of admitting students irrespective of race;
- documentation of 501(c)3 tax-exemption; and,
- the U.S. Education Department's Office for Civil Rights "Assurance of Compliance—Civil Rights Certificate", signed and dated by the school principal (submit signed form to the school district; do not submit to the Special government as indicated on the form)

## **Consultation**

To ensure timely and meaningful consultation, the school district must include private school officials during the design and development of the proposed programs, pursuant to section 8501(c).

It is important that attention be given to the timing of the consultation so that decisions affecting private school participation are made after discussions have taken place. In accordance with section 8501(c)(3), the consultation must occur before the district and private schools make any decisions that affect the opportunities for eligible private school children, teachers and other educational personnel to participate in Title II, Part A programs. The quality of the consultation process will impact the quality of services to private schools.

Pursuant to section 8501(c)(1), school districts must consult with appropriate private school officials and have the goal of reaching agreement on how to provide equitable and effective programs for eligible private schools on issues such as the following:

- How student needs will be identified
- How student needs will inform professional learning needs of teachers, principals and other school leaders
- What services will be offered
- How, where and by whom the services will be provided
- How the services will be assessed and how the results of the assessment will be used to improve those services, as school districts are responsible for ensuring private schools measure effectiveness of funded activities
- The size and scope of the equitable services to be provided to eligible teachers, the amount of funds available for those services and how that amount is determined
- How and when the district will make decisions about the delivery of services, including a thorough consideration and analysis of the views of the private school officials on the provision of services through potential third-party providers
- Whether to provide equitable services to eligible private schools by creating a pool or pools of funds with all of the funds allocated, in accordance with section 8501(a)(4)(C).

School districts are also encouraged to consult with private school officials and provide guidance and/or copies of applicable policies or written procedures, such as travel, stipends, college courses and source documentation required to determine allowability.

### **Affirmation of Consultation**

School districts should obtain a written affirmation signed by officials of each participating private schools that meaningful consultation required by ESSA has occurred. The written affirmation must provide the option for private school officials to indicate if they feel timely and meaningful consultation has not occurred or that the program design is not equitable with respect to eligible private school children.

If private school officials do not provide the written affirmation within a reasonable time period, the district must document that consultation or attempts at consultation took place, pursuant to section 8501(c)(5).

### **Determining Allocations**

The amount a school district must reserve to provide equitable services for private school teachers and other educational personnel for Title II, Part A services is based on the district's total Title II, Part A allocation, less administrative costs. The district determines the amount of funds available for Title II, Part A equitable services by calculating, on a per-pupil basis, the amount available for all public and private school students enrolled in participating private elementary and secondary schools in areas served by the district (regardless of a student's residency).

Unlike Title II, there is not a prescribed methodology districts must use to allocate Title IV funds. For 2023-2024, the allocation for private schools was calculated on a per-pupil basis, as with Title II.

### **Roll Forward**

In general, to ensure that equitable services are provided in a timely manner, a district must obligate the funds allocated for equitable services under all applicable programs in the year for which they are appropriated. (ESEA sections 1117(a)(4)(B) and 8501(a)(4)(B).) There may be extenuating circumstances, however, in which a district is unable to obligate all funds within this timeframe in a responsible manner. Under these circumstances, the funds may remain available for the provision of equitable services under the respective program during the subsequent school year. In determining how such carryover funds will be used, the district must consult with appropriate private school officials. (ESEA sections 1117(b) and 8501(c)).



## **Control of Funds and Reimbursement**

Pursuant to section 8501(d), the district **must maintain control of Title II and Title IV funds at all times**. Any materials, equipment or property purchased with these funds shall remain property of the district, where the materials, equipment or property must continue to be used for the purposes of Title II or Title IV. It is recommended that Private schools maintain an inventory of equipment or property, particularly technology purchases, each year and conduct a yearly reconciliation.

The school district may use **Title II and/or Title IV** funds to **reimburse an individual** private school teacher, principal or other school leader for professional development that the district has pre-approved and meets the reasonable and necessary cost principles of 2 CFR section 200. The school district must not reimburse for unallowable activities. The school district may use **Title IV** funds for purchases of materials or procurement of services for private schools, if such costs have been preapproved. Private schools must work with the district to set up Purchase Orders for all purchases and services.

## **Record Keeping**

While the district may not overburden a private school in paperwork, as the district is fiscally responsible for the management of funds pursuant to section 8501(d), the district may require the private school to submit enough documentation to determine student and teacher needs, as well as documentation to determine that the activities and expenses are allowable, reasonable and necessary, in accordance with any and all Special and state requirements.

School districts that serve private schools expend funds on behalf of the private schools, thus all private school expenditures **must also comply with the district's procurement procedures**.

Districts entering into contracts on behalf of private schools must adhere to district procedures and have the primary responsibility for maintaining documentation.

## **Purchases between \$10,000 and \$50,000 (Small Purchases)**

The Purchasing Department requires that ROs for small purchases between **\$10,000 - 25,000** be documented by least three written quotes. Small purchases between **\$25,000 - \$50,000** require three written quotes *and* an additional level of approval by the Executive Director or by a position equal to or more senior than the Executive Director. Additionally, if the RO is in excess of \$10,000, an agreement must be executed by the requesting school or department that includes a termination clause, addressing termination for cause and for convenience, including the manner by which termination will be effected and

the basis for settlement. In the absence of an executed agreement, the approved purchase order is considered the contract and contains the applicable terms and conditions, including termination for cause or convenience.

### **Purchases Over \$50,000**

The District requires formal advertised procurement procedures to be followed for any purchase greater than \$50,000. All purchases over \$50,000 must be approved by the Board, regardless of which procurement method is used.

In order to meet its general record-keeping responsibility, the school district should document that:

- Representatives of private schools were informed of the availability of services;
- The needs of private and public-school teachers were identified as part of a needs assessment;
- Private school officials were consulted and provided an opportunity for input into the planning of program activities; and
- The district's approved budget permitted equitable participation for private schools

## **Authorized Use of Funds for Title II**

The primary goal of Title II, Part A is to enhance the quality of teaching and principal leadership in order to improve student achievement. A needs assessment of professional development for improved teacher and principal quality should be conducted. Professional development provided using Title II, Part A funds must target the needs of private school personnel and be aligned to the following authorized uses of funds:

1. Providing high-quality, personalized professional development that is evidence-based for teachers, instructional leadership teams, principals, or other school leaders, that is focused on improving teaching and student learning and achievement, including supporting efforts to train teachers, principals, or other school leaders to—

- effectively integrate technology into curricula and instruction (including education about the harms of copyright piracy)
- use data to improve student achievement and understand how to ensure individual student privacy is protected
- effectively engage parents, families, and community partners, and coordinate services between school and community
- help all students develop the skills essential for learning readiness and academic success
- participate in opportunities for experiential learning through observation

2. Developing programs and activities that increase the ability of teachers to effectively teach children with disabilities, including children with significant cognitive disabilities, and English learners, which may include the use of multi-tier systems of support and positive behavioral intervention and supports, so that such children with disabilities and English learners can meet the challenging State academic standards.

3. Providing programs and activities to increase the knowledge base of teachers, principals, or other school leaders on instruction in the early grades and on strategies to measure whether young children are progressing and the ability of principals or other school leaders to support teachers, teacher leaders, early childhood educators, and other professionals to meet the needs of students through age 8, which may include providing joint professional learning and planning activities for school staff and educators that address the transition to elementary school.

4. Carrying out in-service training for school personnel in the techniques and supports needed to help educators understand when and how to refer students affected by trauma, and children with, or at risk of, mental illness, and issues related to school conditions for student learning, such as safety, peer interaction, drug and alcohol abuse, and chronic absenteeism.
5. Providing training to support the identification of students who are gifted and talented, including high-ability students who have not been formally identified for gifted education services, and implementing instructional practices that support the education of such students.
6. Supporting the instructional services provided by effective school library programs.
7. Providing training for all school personnel, including teachers, principals, or other school leaders, Specialized instructional support personnel, and paraprofessionals, regarding how to prevent and recognize child sexual abuse.
8. Developing and providing professional development and other comprehensive systems of support for teachers, principals, or other school leaders to promote high-quality instruction and instructional leadership in science, technology, engineering, and mathematics (STEM) subjects, including computer science.

### **Authorized Use of Funds for Title IV**

The primary goal of Title IV, Part A is to provide students with access to a well-rounded education, improve safe and healthy school conditions for student learning, and improve the use of technology in order to improve the academic achievement and digital literacy of all students.

Resources and supports provided by Title IV, Part A funds may include (but are not limited to) the following:

Well-Rounded Educational Opportunities (ESEA section 4107)	Safe and Healthy Schools (ESEA section 4108)	Effective Use of Technology (ESEA section 4109)
<ul style="list-style-type: none"><li>• Improving access to foreign language instruction, arts, and music education.</li><li>• Supporting college and career counseling, including providing information on opportunities for financial aid through the early FAFSA.</li><li>• Providing programming to improve instruction and student engagement in science, technology, engineering and mathematics (STEM), including access to these subjects for underrepresented groups.</li><li>• Promoting access to accelerated learning opportunities including Advanced Placement (AP) and International Baccalaureate (IB) programs, dual or concurrent enrollment programs and early college high schools.</li><li>• Strengthening instruction in American history, civics, economics, geography, government education, and environmental education.</li></ul>	<ul style="list-style-type: none"><li>• Promoting community and parent involvement in schools.</li><li>• Providing school-based mental health services and counseling.</li><li>• Promoting supportive school climates to reduce the use of exclusionary discipline and promoting supportive school discipline.</li><li>• Establishing or improving dropout prevention.</li><li>• Supporting the re-entry programs and transition services for justice-involved youth.</li><li>• Implementing programs that support a healthy, active lifestyle (nutritional and physical education).</li><li>• Implementing systems and practices to prevent bullying and harassment.</li><li>• Developing relationship building to help improve safety through the recognition and prevention of coercion, violence, or abuse.</li><li>• Establishing community partnerships.</li></ul>	<ul style="list-style-type: none"><li>• Supporting high-quality professional development for educators, school leaders, and administrators to personalize learning and improve academic achievement.</li><li>• Building technological capacity and infrastructure.</li><li>• Carrying out innovative blended learning projects.</li><li>• Providing students in rural, remote, and underserved areas with the resources to benefit from high-quality digital learning opportunities.</li><li>• Delivering Specialized or rigorous academic courses and curricula using technology, including digital learning technologies and assistive technology.</li></ul>

## **The Needs Assessment**

Private schools' use of Title II and Title IV funds should be based on a documented needs assessment that is aligned to a strategic participation plan. The needs assessment process helps determine if the current methods of participation are meeting the needs of private schools. Additionally, information from the needs assessment is used in development of the district's Title II and Title IV applications. Participating schools must submit a needs assessment to the Special Projects office for review and approval, prior to submitting a participation plan. Professional development activities that are not aligned to the school's needs assessment will not be approved for reimbursement.

### **Needs Assessment Components**

The six components of the needs assessment are:

1. Briefly summarize the school's needs assessment process.
2. Identify your students' needs (academic, social-emotional, physical health, digital literacy) that emerged from the process described above. Provide appropriate data for support.
3. Identify your professional development needs, related to addressing the needs identified above.
4. Describe the programs, services or other activities the school intends to implement to address the identified needs.
5. Provide outcome objectives for activities to be funded through Title II, Part A and/or Title IV, Part A. Describe the plan for determining the extent to which these services and programs contributed to addressing needs identified above.
6. Provide a preliminary budget for allocated Title II and Title IV funds. Budgets must include all travel plans, particularly any out of state travel requests, consultant contracts, and specific technology purchases.

## **The Participation Plan**

Upon review and approval of the needs assessment, private schools may submit a plan for participation. Activities included on the participation plan must be aligned to the school's needs assessment and professional development plan. The participation plan may be updated during the school year to reflect new information that was unknown at the time of plan submission. However, plan updating after initial submission is intended to provide flexibility to incorporate exceptions into the planning process; it is not intended as a primary strategy for plan development. Additions that are not aligned to the school's approved needs assessment will not be approved. Activities should not begin prior to being approved by the Special Projects Director/Grant Manager for Title II or Title IV funding. Please allow at least one week prior to the activity for plan review.

### **Guidelines for Professional Development Funded through Title II, Part A**

Professional development activities for private school personnel must be based on a review of scientifically based research and must be expected to improve student academic achievement. Educational services to private school personnel must be **secular, neutral, and non-ideological** [Section 9501(a)(2)]. Title II, Part A funds may be used to pay for a private school teacher's attendance at a professional conference conducted by a faith-based organization to the extent that the conference is part of a comprehensive secular professional development plan for the teacher. Title II, Part A funds may be expended to pay for the portion of the costs of the conference that, as determined by the district, represent the secular professional development in which the teacher participated.

Current guidelines allow the use of Title II funds to support professional development activities for teachers, principals, and other school leaders. See "Authorized Use of Funds" on pages 10 and 11.



## **Methods for Private Schools to Access Services through Title II, Part A**

Private schools may access professional development services through Title II, Part A in six different ways.

### **School-based PD Activities at Private Schools**

Each participating non-public school may conduct site-based professional development activities that will enhance and expand knowledge and skills of teachers, principals, and other school leaders. Costs for these activities will be paid from individual school Title II funds. However, all purchases of professional development services (e.g. consultants) and materials (e.g. professional development books for participants) and other related expenses must be purchased directly through the school district's Spacial Projects office. **Reimbursement of non-public school expenses will not be approved.**

### **Process for School-Based PD**

- Describe each school-based professional development activity that will be supported with the school's Title II funds on the PD plan.
- Clearly and succinctly describe how each activity will enhance and expand knowledge and skills of teachers, principals, and other school leaders.
- Provide the scientifically based research indicating how the activity will advance understanding of effective instructional strategies to increase student achievement or meet the needs identified on the school needs assessment.
- For each activity, indicate the kinds of expenses that are expected to be incurred and paid by Title II funds, including whether or not a consultant will be used. Provide the name of the consultant, if that information is known at the time of plan submission.
- Provide a total of estimated expenses.

Purchase requests must be coordinated through Stacey Milford, who provides required purchase requisition forms for each participating private school and facilitates entering purchase requisitions through the school district's online finance system (TERMS). Stacey may be reached by email at [milfords@pcsb.org](mailto:milfords@pcsb.org) or by calling 727-588-6003.

- Private schools submit activity on Title II PD plan for approval.

- Once approved, private schools submit quotes for registrations, consultants and professional development materials to the Special Projects Office. **This process can take up to 3 weeks, so please plan accordingly.**
- Consultant quotes must be accompanied by a draft invoice or estimate from the consulting company and include the Scope of Work.
- The Special Projects office will enter orders into the school district's TERMS finance system. Schools will receive a copy of the purchase order.
- Upon receipt of materials or upon completion of the services of a consultant, return a signed copy of the Purchase Order to the Special Projects office to verify receipt of material or completion of services. Once these are received, payment can be processed.

It is very important to plan well ahead of the desired activity to ensure the purchasing process is completed in time to deliver requested services. Reimbursement of expenses incurred by non-public schools will not be approved. Services purchased through the Special Projects office may not begin prior to notice by the Special Projects office that the purchasing process has been initiated. This will ensure that purchase orders are issued before services are rendered, as required by the school district's purchasing department.

### **Collaborative Activities Involving Two or More Private Schools**

Schools may choose to collaboratively participate in activities by “pooling” their set-asides. This can be accomplished by designating one individual to serve as the contact person for specific activities who will work with the Special Projects office to implement the spending process. Principals of participating schools will be requested to submit written authorization for pooling school set-asides for specific activities.

#### **Process for Collaborative Activities**

- Describe each professional development activity in which the school will collaborate with one or more schools to “pool” Title II funds on the PD plan.
- Provide the names of collaborating schools at the time of plan submission.
- Clearly and succinctly describe how each activity will enhance and expand knowledge and skills of teachers, principals, and other school leaders.
- Provide the scientifically based research indicating how the activity will advance understanding of effective instructional strategies to increase student achievement or meet the needs identified on the school Needs Assessment.
- For each activity, indicate the kinds of expenses that are expected to be incurred and paid by Title II funds, including whether or not a consultant will be used, and if so provide the name of the consultant if that information is known at the time of plan submission.
- Provide a total of estimated expenses.
- Each school “pooling” funds for an activity should include it on their Title II plan.

### **University/College Level Coursework**

Participation in University/College level coursework that will enhance and expand knowledge and skills of teachers, principals, and other school leaders. Title II does not allow coursework that is solely for the benefit of teachers, such as pursuit of a master's degree, with courses not connected to classroom instruction.

Title IV does not allow University/College level coursework.

#### **Process for University/College Level Coursework**

- List name and subject area of each staff member who is authorized by the school to take university/college coursework for reimbursement on the PD plan.
- For each employee, list name of classes to be taken and reimbursed, location, and dates classes will start and end.
- For each class, provide a syllabus that clearly indicates how the class will enhance and expand knowledge and skills of teachers, principals, and other school leaders.
- For each employee, indicate anticipated expenses to be reimbursed by Title II funds.
- Provide a total of estimated expenses.
- Provide certification of completion of course with reimbursement request

### **Web Based Professional Development Class or Workshop**

Participation in web-based workshops or coursework that will enhance and expand knowledge and skills of teachers, principals, and other school leaders. Related expenses must be purchased directly through the school district's Special Projects office or paid by the individual participant and submitted for reimbursement. **Reimbursement of non-public school expenses will not be approved.**

#### **Process for Web-Based Professional Development**

- List name and subject area of each staff member who is authorized by the school to participate in the web based professional development activity for reimbursement on the PD plan.
- For each employee, list name of web-based professional development to be reimbursed and date(s) activity will start and end.
- For each activity, provide a description that clearly indicates how the professional development will enhance and expand knowledge and skills of teachers, principals, and other school leaders.

- Provide the scientifically based research indicating how the activity will advance understanding of effective instructional strategies to increase student achievement or meet the needs identified on the school needs assessment.
- For each employee, indicate anticipated expenses to be reimbursed by Title II funds.
- Provide a total of estimated expenses.
- Provide certification of completion of course with reimbursement request

### **Travel for Professional Development**

Teachers, principals, and other school leaders of eligible non-public schools may incur travel expenses to participate in appropriate professional development activities that will enhance and expand knowledge and skills. ***Individual travelers*** may incur allowable expenses for reimbursement. **Non-public schools will not be reimbursed for travel expenses incurred on behalf of employees.**

#### **Process for PD Travel**

- List name and subject area of each staff member who will request travel reimbursement on the PD plan.
- Describe the professional development activity including how the professional development will enhance and expand knowledge and skills of teachers, principals, and other school leaders
- Provide the scientifically based research indicating how the activity will advance understanding of effective instructional strategies to increase student achievement or meet the needs identified on the school needs assessment.
- For each activity, provide an estimate of anticipated travel expenses broken down by registration, mileage, meals, etc. **(Please note that FLDOE regulations do not allow for meals for single day travel.)**
- Provide a total of estimated expenses.
- Complete FDOE request for out of state travel, if travel was not approved on project application

## **PD Travel Guidelines**

Travel and registration expenses incurred by private school staff to attend conferences or participate in other professional development activities that enhance and expand knowledge and skills will be reimbursed from Title II Part A funds **to individual travelers, but not to private schools.** If a private school pays travel or registration costs on behalf of a teacher or principal, *those costs cannot be reimbursed to the school or the employee.* Travel must be reasonable and necessary for professional development and must be approved on the school's Title II or Title IV plan. Please note that travel for college coursework is not eligible for reimbursement.

Travelers must complete and submit a Pinellas County Schools travel reimbursement form to the private school administrator for approval signature, and forward to the Special Projects office for review and authorization of expenses. Travel reimbursement forms are provided by the Special Projects office.

Activities funded by Special dollars **must be nonsectarian and non-ideological.**

Allowable travel costs are the same as past years; however, reimbursement rates are revised annually. A summary of travel guidelines is provided below for your convenience. All receipts must have appropriate documentation indicating the employee for whom expenses were incurred.

- Registration—Receipts required.
- Travel to/from by automobile—mileage is **65.5 cents/mile** round trip according to Map quest map mileage.
- Travel to/from by air - original airline receipt required.
- Lodging—Original hotel receipt showing a zero balance is required
- Meals at **\$64/day**—receipts are not required. To be eligible for meals reimbursement, the following guidelines must be used.
  - Breakfast: **\$16.00**—Travel must begin *before* 6 a.m. and extend *beyond* 8 a.m.
  - Lunch: **\$17.00**—Travel must begin *before* 12 noon and extend *beyond* 2 p.m.
  - Dinner: **\$31.00**—Travel must begin *before* 6 p.m. and extend *beyond* 8 p.m.

Note: meals for single day travel are not allowable.

- Rental car, if needed—original receipt required—compact vehicle only unless authorized for different size and rate by the Special Projects office. Receipts for gas for rental car are required.
- Tolls—Receipts required.
- Parking—public parking is allowable, receipt required—valet parking is not allowable, except when hotel automatically includes as part of hotel expenses and traveler has no other option. Airport parking is allowable but must be most economical option available – receipt required.

## **District Professional Development Activities**

Teachers, principals, and other school leaders of eligible non-public schools may participate in district level professional development offerings. A list of courses, dates, times, and locations is available through the district's electronic Professional Learning Network (PLN). The PLN provides descriptions of course offerings on various subjects, target audiences, and prerequisites (if applicable). Private school personnel will oversee their own transcripts and certification through Performance Matters, the vendor that supports the PLN.

### **Process for District Professional Development**

- List name and subject area of each staff member who is authorized by the school to participate in the district professional development activity on the PD plan.
- For each employee, list the district professional development course(s) to be paid using Title II funds, as well as the course start and end date(s).
- For each activity, provide a description that clearly indicates how the professional development will enhance and expand knowledge and skills.
- Provide the scientifically based research indicating how the activity will advance understanding of effective instructional strategies to increase student achievement or meet the needs identified on the school needs assessment.
- Provide a total of estimated expenses.
- Complete and submit a Requisition Worksheet for Performance Matters.
- A Non-PCS Employee Sponsorship Form is required to provide each private school employee a Pinellas County Schools (pcs) email address.
- To access district Professional Development content, staff members need a license for CANVAS. The charge is **\$2.75/person**. CANVAS licenses may be paid using Title II, Part A funding.

## **Methods for Private Schools to Access Services through Title IV, Part A**

Private schools may access any of the professional development activities described for Title II above, using Title IV funds.

In addition to professional development, Title IV funds may be used for the purchase of supplemental enrichment materials, technology hardware and software, instructional materials and supplies, and other resources aligned to program purposes. All purchases require a Purchase Order and vendors must be paid through the district.

Private schools should submit a participation plan to the grant manager, identifying activities and anticipated expenditures for Title IV. Once the plan is approved, the school should submit a quote for the expenditures to Stacey Milford at [participationplan5100@pcsb.org](mailto:participationplan5100@pcsb.org) [participationplan5100@pcsb.org](mailto:participationplan5100@pcsb.org) for processing.

### **Important Dates**

<b>September 28, 2023</b>	Fall Private School Consultation
<b>December 2023</b>	2024-2025 Intent to Participate Forms mailed
<b>January 19, 2024</b>	Intent to Participate Forms due to the Special Projects office
<b>March 2024</b>	Spring Private School Consultation
<b>May 1, 2024</b>	Deadline to submit 2024-25 Needs Assessment
<b>May 10, 2024</b>	Last day to update 2023-2024 <b>Title II/Title IV</b> activity plans
<b>July 12, 2024</b>	Deadline for receipt of <b>Title II/Title IV</b> reimbursement paperwork for 2023-2024 school year (Grants end June 30, 2024)



## District Contacts

Marti Giancola  
Director, Special Projects

Isabella Torbert  
Grant Manager

Guidelines for participation  
Needs assessment development  
Allowable activities  
PD plan approvals

Sandra Turner,  
Secretary

School eligibility

Stacey Milford,  
Grant Account Technician

Purchase Orders  
Reimbursements  
Grant Balances

## Sample Documents and Forms

Samples of the documents that are commonly used for implementing your Title II and Title IV activities are provided on the following pages for your reference.

### **Needs Assessment**

### **PLAN MUST BE COMPLETED AND SUBMITTED ELECTRONICALLY**

#### **Private School Needs Assessment**

**2023-2024 School Year**

**School:**

**Official/Primary Title II/Title IV Contact:**

**Phone Number:**

**E-mail Address:**

#### **Needs Assessment:**

1. Briefly summarize the school's needs assessment process. Identify your students' academic needs and provide appropriate data for support.

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2. Identify your students' academic, social-emotional, physical health, and digital literacy needs that emerged from the process described above. Provide appropriate data for support.

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3. Identify your professional development needs, as related to the students' needs identified above.

**Programs and Services:**

4. Describe the professional development program, services or other activities the school intends to implement to address the identified needs.

**Evaluation Plan:**

5. Provide outcome objectives for activities to be funded through Title II, Part A and/or Title IV, Part A. Describe the plan for determining the extent to which these services and programs contributed to improving student academic achievement.

**Budget Narrative:** List all anticipated expenses in detail to be reimbursed through Title II, Part A and Title IV, Part A.

(Add lines as needed. Submission of an Excel spreadsheet in the same format is acceptable.)

**2023-2024 Title II Allocations:**

Title II \$ \_\_\_\_\_

Title IV \$ \_\_\_\_\_

Activity	Description	Amount	TII	TIV
<b>Travel for Training/Location of Travel</b> <i>Include costs for airfare, mileage, hotel, meals, and other expenses related to participation in professional development activities.</i>				
<b>Registration</b> <i>Include costs for tuition and training registrations including the district's PLN.</i>				
<b>Professional and Technical Services</b> <i>Include cost for contracts with vendors for educational/professional development services (maximum per day allowance of \$3000). Provide contracts.</i>				
<b>Materials and Supplies</b> <i>Include cost for supplemental printing.</i>				
<b>Technology (Title IV only)</b> <i>Technology Cap of %15 for hardware and software</i>				
<b>Total</b>				

**Submitted by:** \_\_\_\_\_  
**Name and Title**

\_\_\_\_\_  
**Signature** **Date**

**District Approval by:** \_\_\_\_\_  
**Name and Title**

\_\_\_\_\_  
**Signature** **Date**

## **Participation Plan**

### **Private School Participation Plan: Title II, Part A and Title IV, Part A (2023-2024)**

**School Name:**

**Person Responsible for Plan Development:**

**Phone:**

**Email:**

**Name of Activity:**

**Type of Activity:** *check one*

- ☐ Professional Development Consultant- site-based
- ☐ University Coursework
- ☐ Web-Based Course/License
- ☐ Travel for Professional Development
- ☐ District-Offered Professional Development
- ☐ Extended Learning/Enrichment Program (*Title IV only*)
- ☐ Purchase of Instructional Materials/Supplies (*Title IV only*)
- ☐ Technology Hardware/Software (*Title IV only*)

**Description of Activity:**

**Date(s) of Professional Development** (*if applicable*):

**Name(s) of Professional Development Participants** (*if applicable*):

**Need(s) Addressed:**

**Funding Source(s) and Estimated Expenses:**

☐ Title II, Part A: Supporting Effective Instruction

☐ Title IV, Part A: Student Support and Academic Enrichment

**Special Projects Review:** (*to be completed by Special Projects office*)

## **Non-PCS Employee Sponsorship Form**

### **PINELLAS COUNTY SCHOOLS NON-PCS EMPLOYEE ACCOUNT SPONSORSHIP FORM**

The purpose of this form is to conform to state regulations on providing access to schools networks, data, and communication services. All accounts for non-PCS employees require sponsorship by PCS Administrator and are up for renewal annually.

**Please email completed form to [sponsoredaccount@pcsb.org](mailto:sponsoredaccount@pcsb.org)**

When the account has been created or renewed, a TechHelp ticket will be emailed to the account sponsor.

Choose One: New \_\_\_\_\_ Renewal \_\_\_\_\_ Change \_\_\_\_\_ Delete Date \_\_\_\_\_

Please setup access for (Print Legal Full Name) \_\_\_\_\_

Birthdate: \_\_\_\_\_

To the following systems:

\_\_\_\_\_ Network (Pinellas domain)

\_\_\_\_\_ VPN (remote access)

\_\_\_\_\_ TERMS (**Requires approval by Associate Superintendent Finance and Business Services**)

\_\_\_\_\_ Student Information System (View Only) – (**Requires proper documentation such as board approved contract or an email explicitly authorizing access from the school board attorney**)

Choose one: School Cost Center \_\_\_\_\_ Access to all School Cost Centers \_\_\_\_\_

\_\_\_\_\_ PCSB.org email account

Purpose/Rationale/Justification \_\_\_\_\_

Location/Address \_\_\_\_\_

Req. Activation Date \_\_\_\_\_ End/Renewal Date (1 year from activation unless contract stipulates sooner) \_\_\_\_\_

Signature of PCS Administrative Sponsor \_\_\_\_\_ Date \_\_\_\_\_

Printed name of PCS Administrative Sponsor \_\_\_\_\_ Phone/Ext \_\_\_\_\_

Title of PCS Administrative Sponsor \_\_\_\_\_ Dept/School Name \_\_\_\_\_ Cost Ctr # \_\_\_\_\_

### **TIS USE ONLY**

Approved by TIS Administrator

\_\_\_\_\_ Date \_\_\_\_\_

TIS Notes

# Requisition Worksheet

PINELLAS COUNTY SCHOOLS

REQUISITION WORKSHEET (see back for instructions)			
<b>REQ NUMBER :</b> _____ <small>(12-Digit Number = 4-digit Cost Center + 8-digit system generated number)</small> <b>VDR:</b> <u>y</u> <u>34436</u> <small>(Prefix) (Suggested VDR No.) Mandatory Field</small> <b>RQ:</b> _____ <small>Requester Code (4 Digits)</small> <b>SH:</b> _____ <small>Ship To Code - Change if different from RQ</small>	<b>T/C:</b> _____ <small>Terms &amp; Conditions Codes. See C13 panel for options</small> <b>TY:</b> _____ <b>CO:</b> _____ <small>Used only for systems contract requisitions</small> <b>BC:</b> _____ <small>Buyer Code (3 Digits) Mandatory Field</small>	<b>Vendor Name:</b> <u>Performance Matters</u> <b>Vendor Address:</b> <u>8860 E Chaparral Rd Suite 100</u> <b>City/State/Zip:</b> <u>Scottsdale AZ 85250</u> <b>Vendor Phone:</b> <u>(407) 645-1800</u> <b>Worksheet Date:</b> _____ <b>Date/Source of Price:</b> <u>Den Turner 801-803-3404</u> <b>Deliver on or Before:</b> _____ <b>Deliver After:</b> _____	

  

NO.	REF	PCSB ITEM NO.	DESCRIPTION <small>(also include catalog #, name, brand, model, color, size, etc.)</small>	QTY	UNIT	UNIT PRICE	EXTENSION
			DELIVER TO ATTENTION OF: Name of School				
			Site license for PD certification up to 250 licenses per school	1	lot	2000.00	2000.00

  

**FUNDING ACCOUNT STRIP**

RF	ACCNT	FUND	FUNC	OBJT	CNTR	PROJ	SUBP	PRGM	REQUESTED

  

Purpose: \_\_\_\_\_ Class/Club Sponsor: \_\_\_\_\_ Organization Officer: \_\_\_\_\_  
 Elke Work Order No. \_\_\_\_\_ Requester Signature /Date: \_\_\_\_\_ Authorized By /Date: \_\_\_\_\_



## **Prepayment Authorization Form**

PINELLAS COUNTY SCHOOLS  
**PREPAYMENT AUTHORIZATION**  
(PURCHASE ORDER NOT REQUIRED)

USE FOR: **POSTAGE**  
OBJECTS: 0373

**REGISTRATION (\$25 MINIMUM)**  
0333

**MEMBERSHIP**  
0730

**SUBSCRIPTIONS**  
6200/0530 or 0510

TYPE OR PRINT CLEARLY IN INK  
SUBMIT FORM TO ACCOUNTING.

DATE \_\_\_\_\_

<b>Vendor:</b> _____ (Prefix) (Number)	<b>Ship To</b> (School/Dept. Name and Address):
(Vendor Name and Address):	Pony RT. # _____
	<b>Attn.:</b>

QUANTITY/	FULL DESCRIPTION	UNIT COST	TOTAL

1. SEND **TWO COMPLETED** COPIES (ONE ORIGINAL + ONE COPY IF POSSIBLE) OF ORDER FORMS, MEMBERSHIP REQUESTS OR REGISTRATION APPLICATIONS WITH THIS FORM TO **ACCOUNTING**.
2. ORDER INITIATOR NEEDS TO CONFIRM RECEIPT OF SERVICES OR DELIVERY OF GOODS.

**FOR TRAVEL RELATED EXPENSES ONLY:** Pursuant to Section 112.061 (3) (a), Florida Statutes, I hereby certify or affirm that to the best of my knowledge the expenses requested will be on official business of the School Board of Pinellas County.

PAPERWORK PREPARER:	DEPT.:	PHONE NO.:
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IMMEDIATE SUPERVISOR SIGNATURE:

EXPENSE AUTHORIZER SIGNATURE:	PHONE NO.:
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[illegible]

**Make sure funds are available before submitting this form to Accounting.**

# Travel Authorization and Claim Form

## PINELLAS COUNTY SCHOOLS OUT OF COUNTY TRAVEL AUTHORIZATION AND CLAIM FORM

\_\_\_\_\_  
(Last 5 digits of Soc. Security #)

1. Type or print CLEARLY in ink. Submitting in blue ink reduces possibility of duplicate payment.
2. Complete entire form prior to submittal, INCLUDING REQUIRED SIGNATURES (payee, supervisor and expense authorizer).
3. Include office phone number where requested below.

FULL NAME: \_\_\_\_\_ (FIRST) (M.I.) (LAST) (Use your name and address as they appear on your payroll check.)  
HOME ADDRESS: \_\_\_\_\_ POSITION: \_\_\_\_\_  
CITY: \_\_\_\_\_ ZIP: \_\_\_\_\_ OFFICE/SCHOOL (HOME BASE): \_\_\_\_\_  
PURPOSE OF TRAVEL (mandatory) \_\_\_\_\_  
FOR PERIOD FROM: \_\_\_\_\_ THROUGH: \_\_\_\_\_  
City and State \_\_\_\_\_

Must be completed (including AM or PM) for ALL travel

Departed: Date \_\_\_\_\_ Time \_\_\_\_\_ am/pm Returned: Date \_\_\_\_\_ Time \_\_\_\_\_ am/pm  
Departed: Date \_\_\_\_\_ Time \_\_\_\_\_ am/pm Returned: Date \_\_\_\_\_ Time \_\_\_\_\_ am/pm  
Departed: Date \_\_\_\_\_ Time \_\_\_\_\_ am/pm Returned: Date \_\_\_\_\_ Time \_\_\_\_\_ am/pm

SELECT EITHER: SECTION A ONLY (per diem includes both meals and lodging) OR **OBJ.**  
SECTIONS B AND C (meals and lodging - lodging receipt required)

PLEASE REFER TO ACCOUNTING'S INTRANET WEBSITE FOR CURRENT TRAVEL REIMBURSEMENT RATES (MILEAGE, MEALS, PER DIEM)

A. PER DIEM No. of Days \_\_\_\_\_ @ \$ \_\_\_\_\_ = \$ \_\_\_\_\_ 0332

B. MEAL ALLOWANCE: Breakfast - travel must begin before 6 a.m. and extend beyond 8 a.m.  
Lunch - travel must begin before 12 noon and extend beyond 2 p.m.  
Dinner - travel must begin before 6 p.m. and extend beyond 8 p.m.

No. of Meals Breakfast \_\_\_\_\_ @ \_\_\_\_\_ Lunch \_\_\_\_\_ @ \_\_\_\_\_ Dinner \_\_\_\_\_ @ \_\_\_\_\_ TOTAL MEALS \$ \_\_\_\_\_ 0332  
(Do not request reimbursement for meals included in registration fee.) 0334\*

\* Object 0334 shall only be used for Non-School Board employees (i.e., volunteers, grant recipients, etc.)  
when travel does not include an overnight stay.

C. LODGING RECEIPT (Please attach original receipt; if room shared with family member, indicate family.  
Do not request reimbursement of lodging when included in registration payment.)

NAMES OF THOSE SHARING ROOM \_\_\_\_\_ LODGING \$ \_\_\_\_\_ 0332

D. TOTAL MILEAGE (include copy of Mapquest) \_\_\_\_\_ @ \_\_\_\_\_ = \$ \_\_\_\_\_ 0332

E. REGISTRATION - (Do not request reimbursement for meals or lodging included in the  
registration fee.) \$ \_\_\_\_\_ 0333

F. OTHER AUTHORIZED EXPENSES (List and attach original receipts: e.g. tolls, parking fees, airline tickets, etc.)

\_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ 0332

I hereby certify or affirm that above expenses were actually incurred by me as necessary traveling expenses in the performance of my official duties; attendance at a conference or convention was directly related to official duties of the agency; any meals or lodging included in a conference or convention registration fee have been deducted from this travel claim; and that this claim is true and correct in every material matter and same conforms in every respect with the requirements of Section 112.061, Florida Statutes. It is further understood that the Board is prohibited by Florida Statutes from providing any reimbursement in addition to the standard mileage rate for expenses associated with the ownership, maintenance and operation of a privately owned motor vehicle including automobile insurance deductible and coverage costs.

PAYEE SIGNATURE \_\_\_\_\_ Date: \_\_\_\_\_

Pursuant to Section 112.061 (3) (a), Florida Statutes, I hereby certify or affirm that to the best of my knowledge the above travel was on official business of the School Board of Pinellas County and was performed for the purpose stated above:

IMMEDIATE SUPERVISOR SIGNATURE: \_\_\_\_\_ Date: \_\_\_\_\_

EXPENSE AUTHORIZER SIGNATURE: \_\_\_\_\_ Date: \_\_\_\_\_

TOTAL REIMBURSEMENT

ACCT USE ONLY  
PROCESSED BY:

REFERENCE LINE	FUND	GENERAL LEDGER	FUNCTION	OBJECT	COST CENTER	PROJECT	SUB PROJECT	PROGRAM	PAYMENT AMOUNT
				0332					
				0333					
				0334					

**TO AVOID DELAY IN PAYMENT, PLEASE VERIFY FUND AVAILABILITY BEFORE SUBMITTING TO ACCOUNTING.**