

Equitable Services Worksheet

Help and Guidance Document

June 03, 2022

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DISTRICT INFORMATION

On the top of the sheet please enter the district name, district code, and date the workbook is being completed.

Pupil Counts

Total District Enrollment

Enter the total student enrollment of for all public schools within the LEA from the prior fall count date. This value should align to total of the “Adjusted Total Student Count” shown on the “Data on Schools in the District” screen of your Consolidated Application in NexSys.

Title I Participating Schools Low-Income Count

Enter the total count of all students who qualified in the prior year for free and reduced lunch and attended either a building being that will be served with Title I funds or that will be served as a skipped school with Section 31a funds to provide a Title I Like program. This value should align to the total “Public Low-Income Pupil Count” shown on the “Allocation to School Attendance Areas” screen of your Consolidated Application in NexSys.

District Identified English Learners

Enter the total number of students who have been identified in the prior year as being eligible for Title III English Learner (EL) services and attended a public school in the district.

District Identified Immigrant Students

Enter the total number of students who have been identified in the prior year as being eligible for Title III Immigrant Student (IS) services and attended a public school in the district.

Current Year Allocation

Enter your current year allocation for each program in which private schools will be participating. These values should align to the allocations shown in your MEGS+ Consolidated Application budget summary screen for each program as well as the “Allocation Available” value from the “Review Grant Selections” screen in your NexSys Consolidated Application for programs that are part of that application.

Carryover

Total Carryover

For each program where carryover is available in your Consolidated Application, enter the total amount of available carryover in the first column. This value should align to the carryover availability shown in your MEGS+ Consolidated Application budget summary screen for each program as well as the “Carryover Available” value from the “Review Grant Selections” screen in your NexSys Consolidated Application for programs that are part of that application.

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Private Carryover

For each program where carryover is available, enter the amount of carryover that needs to be reallocated back to provide equitable services for the private schools. This value should align with the amount shown on the Final Expenditure Report (FER) for the program as the difference between the amount budgeted for equitable services under FC 371 and the amount expended for equitable services under FC 371. If this amount is negative (the LEA expended more than required) enter \$0.

Current Year Transfers Out

LEAs must consult with private schools prior to making any decisions regarding transfers. Districts that are eligible for Title V – Small Rural School Achievement (SRSA) program funds direct from USED have additional flexibilities for utilization of funds without having to transfer those funds to another program. Any funds a district intends to use under the SRSA flexibility should not be listed here as transferred funds.

For each grant source enter the amount of funds that will be transferred out of the current year allocation for that grant to support programs in one of the recipient grants. The total transfers out cannot exceed the total allocation availability for the grant. The transfer amounts should align with the amounts budgeted as transfers in your MEGS+ Consolidated Application and any amounts shown in your NexSys Consolidated Application on the “New Funds Transfers” screen as being transferred into one of the Title I, Part A programs.

New Administrative Costs

Administrative costs for Title III – English Learners, Title III – Immigrant Students, and Title IV are capped at 2%, including both direct and indirect expenses. If the total amount of funds identified to be used for administrative costs in one of these programs exceeds this limit, the administrative costs fields will turn red.

District Restricted Indirect Cost Rate

Under the Title II heading, enter the restrict indirect cost rate that is applicable to for the grant year. This should align to the value shown on your budget summary screens within the MEGS+ Consolidated Application.

NOTE: The value shown in the MEGS+ application prior to the start of the new school year will not reflect the rate that will be in place during the main program year. For the most up to date indirect cost rate information please visit the [School Aid and School Finance Office website](#).

Amount Budgeted for Indirect Costs on Current Year Allocation

On Row O enter the amount of funds the LEA intends to budget for indirect costs in each program. The maximum amount allowed for such costs will be shown on Row N based on the lower of the LEA’s indirect cost rate or any statutory limits for each program on allowable amounts for administrative costs.

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Amount Budgeted for Indirect Costs on Current Year Transfers from Title II

On Row Q enter the amount of funds the LEA intends to budget from the amount transferred to a program from Title II for indirect costs. These transferred indirect cost values will still be budgeted as part of the total indirect for Title II on the Budget Summary screen in the MEGS+ Consolidated Application. The maximum amount allowed for such costs will be shown on Row P based on the lower of the LEA's indirect cost rate or any statutory limits for each program on allowable amounts for administrative costs.

Amount Budgeted for Indirect Costs on Current Year Transfers from Title IV

On Row S enter the amount of funds the LEA intends to budget from the amount transferred to a program from Title IV for indirect costs. These transferred indirect cost values will still be budgeted as part of the total indirect for Title IV on the Budget Summary screen in the MEGS+ Consolidated Application. The maximum amount allowed for such costs will be shown on Row R based on the lower of the LEA's indirect cost rate or any statutory limits for each program on allowable amounts for administrative costs.

Amount Budgeted for Direct Administrative Costs on Current Year Allocation

On Row T enter the amount of funds the LEA intends to budget for direct administrative costs in each program.

Minimum Indirect to be budgeted in MEGS+ in each grant

Row U will show the minimal value that must be budgeted in each grant source on the Budget Summary Screen in the MEGS+ Consolidated Application. Additional indirect beyond this amount may be budgeted based on any carryover available within the grant source.

DATA ON PRIVATE SCHOOLS

Private Schools

Provide the name of each participating private school in the first column of the table. LEAs should refer to the list of approved Nonpublic Schools on the [MDE Nonpublic and Home School website](#) to verify their eligibility to receive equitable services.

In/Out of District

For each private school listed, the LEA should identify if the school is located inside or outside of the district boundaries. Out of district private schools are only eligible for Title I Part A programs and should not include data related to any other programs.

Title I Participation

For each private school listed, if they will be participating in the Title I, Part A Basic program, please change the dropdown value for Title I Participation to "yes" to ensure they are included in the equitable services calculations for Title I, Part A.

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Resident Low-Income Counts

For any school identified as participating in Title I, Part A provide the resident low-income count for that school. Resident low-income count should only include the count of private school children who, based on residency, would have attended a public school with a Title I or skipped school program within the LEA [ESEA § 1117(b)(1)(F)].

NOTE: Private school student counts should, like the public-school counts, be representative of enrollment the prior fall and not current year enrollment data. If a private school is unable to provide the required “Resident Low-Income Count” data, counts used for equitable services in the prior year’s application can be used for a second year [ESEA § 1117(a)(4)(D)]. The data should always represent historical data, not current year enrollment. See also ESEA § 1117(c)(1) for alternative methods available to determine the “Resident Low-Income Count” for participating private schools.

Title II and Title IV Participation

For each in-district private school listed, if they will be participating in either of the Title II or Title IV programs, please change the dropdown value for the applicable program to “yes” to ensure they are included in the equitable services calculations that program.

Total Pupil Counts

If any listed private school is participating in either the Title II or Title IV program, please provide the total pupil enrollment in that private school from the prior fall. All students who attend the private school in grades K-12 should be included in the count regardless of residency.

Title III-EL Participation and English Learners Count

For each in-district private school listed, if they will be participating in the Title III English Learner program, please change the dropdown value for Title III-EL Participation to “yes” to ensure they are included in the equitable services calculations that program. For each participating school please provide count of students in that private school from the prior fall who were eligible to participate in the English Learner program. All eligible students who attend the private school in grades K-12 should be included in the count regardless of residency.

Title III-IS Participation and Immigrant Student Count

For each in-district private school listed, if they will be participating in the Title III Immigrant Student program, please change the dropdown value for Title III-IS Participation to “yes” to ensure they are included in the equitable services calculations that program. For each participating school please provide count of students in that private school from the prior fall who were eligible to participate in the Immigrant Student program. All eligible students who attend the private school in grades K-12 should be included in the count regardless of residency.

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TITLE I EQUITABLE SERVICES

This screen will use the information provided from the [District Information](#) worksheet and the [Data on Private Schools](#) worksheet to calculate amounts available to provide equitable services in each private school based on a prorated share of the equitable service amounts. Since equitable service amounts in Title I, Part A are calculated prior to the LEA reserving funds for administrative costs, this screen will also allow the LEA to reserve funds, from the amounts calculated for equitable services, for the administration of the services provided to the participating private schools.

If an LEA's total Title I allocation plus new transfers in is greater than \$500,000, this screen will also automatically calculate the portion of funds that must be utilized to provide parent and family engagement activities in the private schools.

NOTE: The values shown on this screen are for estimation purposes only. Due to slight variations between NexSys and this worksheet related to rounding within the calculation steps it is possible that the results shown in each application may differ. If the values differ, the values shown in NexSys should be used to develop your final budgets for Title I, Part A Equitable Services.

Negotiated Private School Title I, Part A Indirect Amount

If the LEA, in agreement with the participating private schools, wishes to take a portion of funds off the top of the amount available for the provision of equitable services, that amount should be entered in the "Negotiated Private School Title I, Part A Indirect Amount" box on the top table. This amount is limited by the indirect rate as shown in the "Maximum Indirect Amount on Private School Title I, Part A" box. The amount held for negotiated indirect costs will be subtracted from the total equitable services amount and should be budgeted as part of the indirect amount shown on the Title I, Part A budget summary screen in the MEGS+ Consolidated Application.

Title I, Part A Equitable Services Carryover

If the LEA indicated on the [District Information](#) worksheet that there was Title I, Part A carryover which needed to be allocated back to private schools, the LEA will need to use the "Title I, Part A Equitable Services Carryover" column to distribute those funds. The total carryover availability and remaining amount to be distributed will be shown on the bottom two rows of the top table. For each participating private school, enter the share of the funds that will be attributed back to that private school. If a private school declines additional services, the value of those services should be added to other private schools' amounts. An LEA does not need to allocate additional funds back to a participating private school if, during consultation, it is agreed that the private school would be unable to make use of services funded by the additional carryover amounts. An LEA should document, in writing, the private school's refusal of additional services. If the LEA has made and documented a reasonable effort to engage in consultation with the private school, failure of a private school to engage in that consultation or to provide program input in a timely manner may be considered a refusal of services. In most cases, it would be expected that unexpended amounts from the prior year are fully allocated back to participating private schools.

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Negotiated Direct Admin Charge

A LEA, in agreement with the participating private schools, may choose to take a portion of each school's prorated share of funds to cover direct administrative costs. The amount to be deducted from each private school's share of the equitable services should be entered in the "Negotiated Direct Admin Costs" column in the bottom table. A LEA may not charge both indirect and direct administrative costs for the same administrative cost and must have receipts or documentation of any direct administrative costs being charged against the private school equitable services. Direct administrative costs for the provision of equitable services should be budgeted within the Title I, Part A budget in the MEGS+ Consolidated Application as a FC 371 expense.

For additional information about the provision of equitable services for Title I, Part A and the application of administrative costs on those services please see the [Non-Regulatory Guidance](#).

Parent and Family Engagement Carryover

If the LEA was required to reserve funds in the prior year for parent and family engagement activities and did not fully expend the required amount on such activities, please indicate in this column the amount of carryover funds that were attributed to that expenditure shortfall and will be used to fund parent and family engagement activities in the current year.

EQUITABLE SERVICES REPORT

This screen will use the information provided from the [District Information](#) worksheet and the [Data on Private Schools](#) worksheet to calculate amounts available to provide equitable services in each private school for the programs they are participating in based on a prorated share of the available equitable service amounts.

Carryover Columns

If the LEA indicated on the [District Information](#) worksheet that there was carryover for a program that needs to be allocated back to private schools, the LEA should use the appropriate carryover column to distribute those funds. The unallocated balance of carryover for a program will be shown on the bottom row of the table. For each private school participating in a program enter the share of the funds that will be attributed back to provide services in that private school. If a private school declines additional services, the value of those services should be added to other participating private schools' amounts. An LEA does not need to allocate additional funds back to a participating private school if, during consultation, it is agreed that the private school would be unable to make use of services funded by the additional amounts. An LEA should document, in writing, the private school's refusal of additional services. If the LEA has made and documented a reasonable effort to engage in consultation with the private school, failure of a private school to engage in that consultation or to provide program input in a timely manner may be considered a refusal of services. In most cases, it would be expected that unexpended amounts from the prior year are fully allocated back to participating private schools.