CCIP Schoolwide Pool User Guide

Issue Date: June 15, 2009
Keywords: Financial
Summary: Instructions for using the Schoolwide Pool functionality in CCIP

Purpose

The purpose of this document is to provide school districts, particularly those associated with the grant application and management of Federal Programs, with useful guidance toward creating and managing a Schoolwide Pool grant in CCIP.

Table of Contents **Page**

1. Purpose of Schoolwide Pool 2
2. Allocate Funds to Schoolwide Pool 3
3. Make Buildings Eligible for Schoolwide Pool 6
4. Schoolwide Pool Overview Page 6
5. Print Schoolwide Pool Page 9
6. Schoolwide Pool Page messages 10
7. Budget Page for Schoolwide Pool 11
8. Appendix 12

1 Purpose of Schoolwide Pool

The purpose of this document is to outline a set of business rules and protocols to help districts and schools implement schoolwide programs. The central piece is to allow districts to build a pool of funds to implement their schoolwide programs. The pool will be developed at the district level so treasurers do not have to do double bookkeeping. Thus the program coordinators can more easily work with building principals to develop an overall budget. The Schoolwide (SW) Pool can be created from the funds that belong to the Consolidated Funding Application as well as from state and local funds. In order to participate, it is mandatory that the Title I grant must allocate funds to the SW Pool; any Targeted Assisted (TA) served building is not eligible to participate in the SW pool.

The participation in the Schoolwide Pool is optional for the school district. Also, note not all schoolwide buildings in a district have to participate in the Schoolwide Pool.

This feature has the following functions:

- Allows districts to allocate funds to the Schoolwide Pool on the allocation page of the Consolidated Funding Application section. The title grants (e.g. Title I) and state and local funds can transfer money from their own fund to this pool.
- Enables districts to decide which buildings in the participating school district are eligible for using funds from the Schoolwide Pool (Building Eligibility Page).
- If the district participates in the Schoolwide Pool program (by transferring funds on the allocation page), a link for the Schoolwide Pool overview page will be automatically be created in the Consolidated Funding Application section. There will also be additional links for revision changes, error/warning messages and printing the Schoolwide Pool related pages.
- Eligible school buildings in the district will be displayed on the Schoolwide Pool overview page. The user can allocate the appropriate amount for each participating building and indicate from which contributing title grant the funding is coming from.
- On the Schoolwide Pool budget page, the user can budget the total Schoolwide Pool amount against various OBJECT CODEs (e.g. salaries) and PURPOSE CODEs (e.g. Instruction).

The following sections cover details of all the functions noted above. Screen snapshots are provided wherever possible. An appendix is provided for easy reference to explain business rules and corresponding error messages.

2 Allocating Funds to the Schoolwide Pool

To allocate funds, open the Consolidated Funding Application sections page. Select the year and ensure that the application is in the “Draft Started” status. Since funds have not been allocated to the Schoolwide Pool, the link for the Schoolwide Pool is not visible.

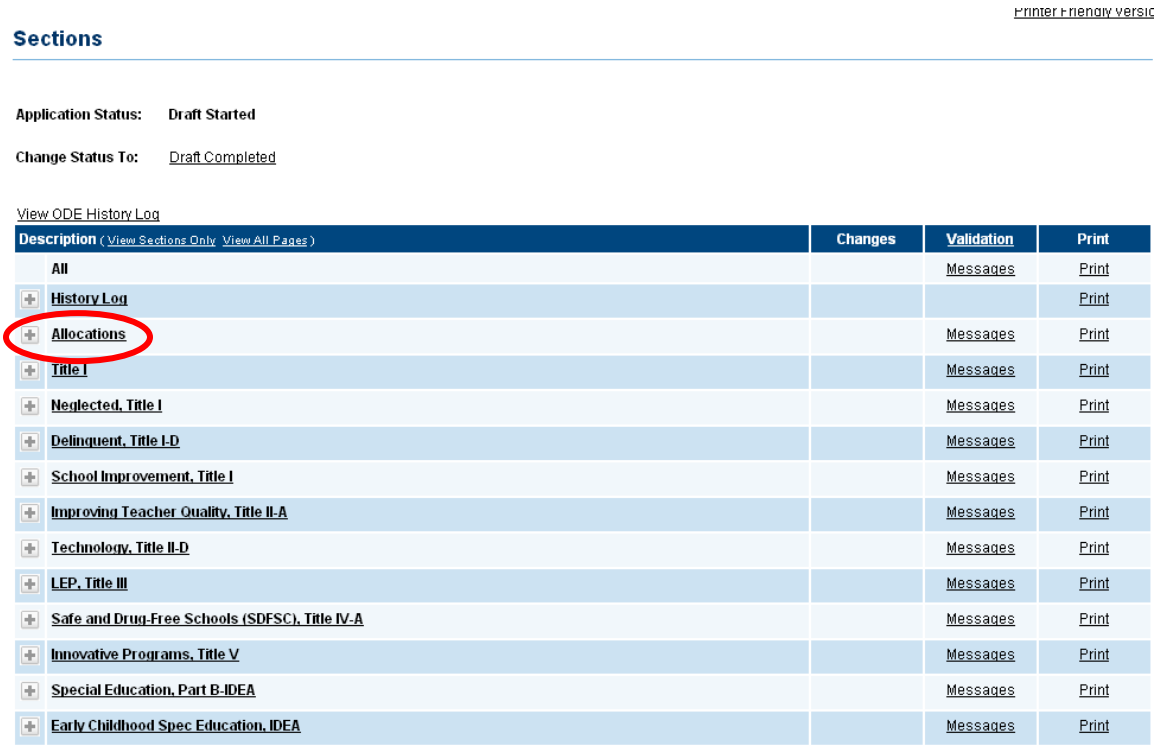


Figure 1 Consolidated Application Section without Schoolwide Pool

To transfer funds to the Schoolwide pool, click on the *Allocations* link. This opens the Allocation page.

On the allocations page, you will see a column heading entitled “SW Pool” near the right-hand corner of the table (next to the “Total” column). Transfer the funds from the other (contributing) titles to the Schoolwide Pool in the corresponding boxes. Since the Allocation page is too big to fit the Internet browser, only part of the page is being displayed here.

	m	(11) IV SDFSC	(12) V Innov	(13) VI-B Rur	(14) IDEA-B	(15) ECSE	(16) SW Pool
Original	00	0.00	0.00	0.00	0.00	0.00	0.00
Incoming Carryover	00	50,579.73	35,017.09	0.00	4,597,884.65	53,921.77	0.00
Outgoing Carryover	00	0.00	0.00	0.00	0.00	0.00	0.00
Reallocated	00	0.00	0.00	0.00	0.00	0.00	0.00
Additional	00	0.00	0.00	0.00	0.00	0.00	0.00
Released	00	0.00	0.00	0.00	0.00	0.00	0.00
Consortium	00	0.00	0.00	0.00	0.00	0.00	0.00
Forfeited	00	0.00	0.00	0.00	0.00	0.00	0.00
FER Released	00	0.00	0.00	0.00	0.00	0.00	0.00
Total	00	50,579.73	35,017.09	0.00	4,597,884.65	53,921.77	0.00

	m	(11) IV SDFSC	(12) V Innov	(13) VI-B Rur	(14) IDEA-B	(15) ECSE	(16) SW Pool
From I							0.00
From I-Neg							0.00
From I-D Del							0.00
From I-C Mig							0.00
From I-SI							0.00
From I-CSR							0.00

Figure 2 Allocation page with Schoolwide Pool fund

After transferring funds from the contributing titles, save the changes by clicking the "Save and Go To" button at the top of the Allocation page.

2.1 Business rules:

- In order to create the Schoolwide Pool, the Title I must contribute funds to it. If other titles funds have been transferred but Title I funds have not, the following error message will be displayed:

Allocations

Allocations	
Improving Teacher Quality, Title II-A may not allocate funds to the Schoolwide Pool unless Title I is also doing so.	Error
Safe and Drug-Free Schools (SDFSC), Title IV-A may not allocate funds to the Schoolwide Pool unless Title I is also doing so.	Error
Special Education, Part B-IDEA may not allocate funds to the Schoolwide Pool unless Title I is also doing so.	Error
Early Childhood Spec Education, IDEA may not allocate funds to the Schoolwide Pool unless Title I is also doing so.	Error
LEP, Title III may not allocate funds to the Schoolwide Pool unless Title I is also doing so.	Error
Neglected, Title I may not allocate funds to the Schoolwide Pool unless Title I is also doing so.	Error
Delinquent, Title I-D may not allocate funds to the Schoolwide Pool unless Title I is also doing so.	Error
School Improvement, Title I may not allocate funds to the Schoolwide Pool unless Title I is also doing so.	Error
Technology, Title II-D (Formula) may not allocate funds to the Schoolwide Pool unless Title I is also doing so.	Error

Figure 3 Error message when Title I doesn't contribute to SW Pool

Once Title I funds have been transferred to the SW Pool the error message will go away.

Note: Total amount of funds transferred into the SW Pool from Title I must be greater than or equal to the total of building allocation amount for the participating buildings.

The adjusted allocation for any contributing title should not be less than zero. If this happens, user will not be able to save the information in the allocation page.

If a title that was used to contribute to SW Pool no longer contributes (i.e. change the transfer amount for SW Pool to $0), the corresponding SW Pool grant amount for this title will be removed from the system.

Since funds have been transferred to the Schoolwide Pool on the Allocations page, the Consolidated Funding Application Section page will now display the link for the Schoolwide Pool.

Note: The district must retain the allocation for services to non publics in the budget of origin. This amount is not allowable to be transferred into the schoolwide pooling of funds.

Note: Consortium funds from other districts should not be transferred into the schoolwide pool.

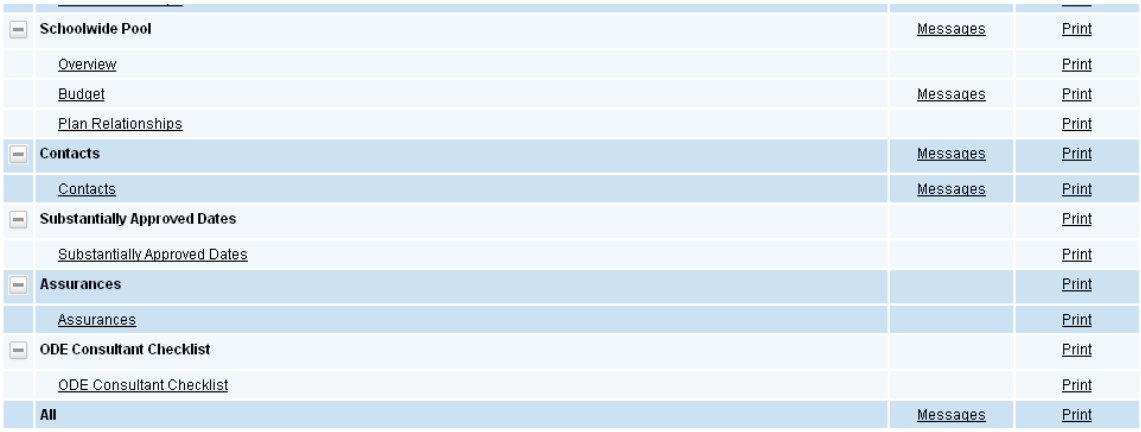
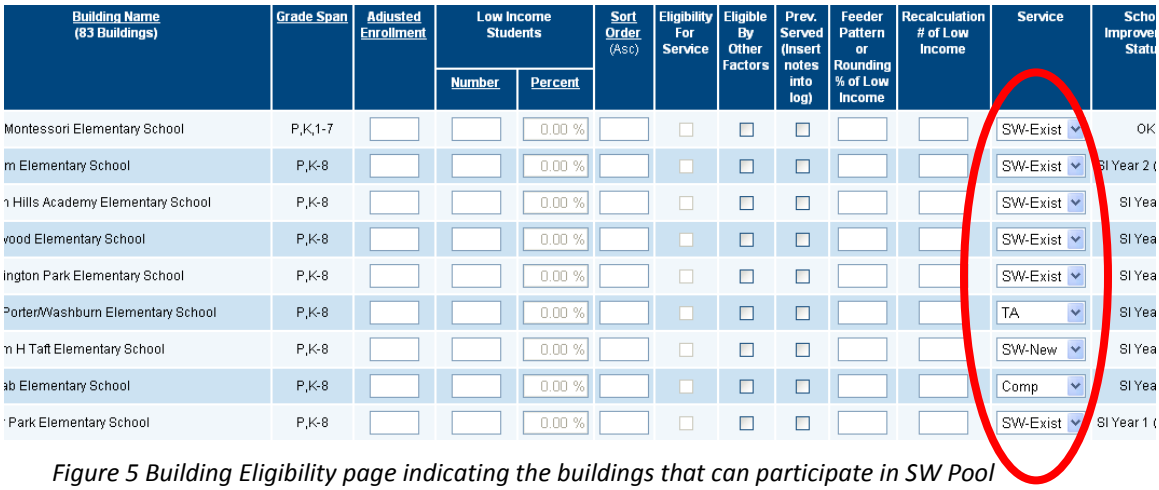


Figure 4 Consolidated Application Section with Schoolwide Pool

3 Making Buildings Eligible for the Schoolwide Pool

In order to make buildings eligible to participate in the Schoolwide Pool fund, open the "Building Eligibility" page. Select all buildings that need to participate in the Schoolwide Pool fund and save the data by pressing "Save and Go To" button.



Building Name (83 Buildings)	Grade Span	Adjusted Enrollment	Low Income Students		Sort Order (Asc)	Eligibility For Service	Eligible By Other Factors	Prev. Served (Insert notes into log)	Feeder Pattern or Rounding % of Low Income	Recalculation # of Low Income	Service	Scho Improve Statu
			Number	Percent								
Montessori Elementary School	P,K,1-7			0.00 %							SW-Exist	OK
m Elementary School	P,K-8			0.00 %							SW-Exist	SI Year 2 (
n Hills Academy Elementary School	P,K-8			0.00 %							SW-Exist	SI Yea
wood Elementary School	P,K-8			0.00 %							SW-Exist	SI Yea
ington Park Elementary School	P,K-8			0.00 %							SW-Exist	SI Yea
Porter/Washburn Elementary School	P,K-8			0.00 %							TA	SI Yea
n H Taft Elementary School	P,K-8			0.00 %							SW-New	SI Yea
ab Elementary School	P,K-8			0.00 %							Comp	SI Yea
Park Elementary School	P,K-8			0.00 %							SW-Exist	SI Year 1 (

Figure 5 Building Eligibility page indicating the buildings that can participate in SW Pool

3.1 Business rules:

- In order to make a building eligible, the Service of the corresponding school must be set to either SW-EXIST or SW-NEW. This will allow the building to receive funding from the Schoolwide Pool. Initially all of the corresponding SW Pool amounts for the buildings will be set to $0.
- In order to make a building ineligible, the Service of the corresponding school must be set to either NONE or TA or COMP. If a building's eligibility status is changed from eligible to ineligible, all of the corresponding SW Pool grant amounts for this building will be removed from the system.

4 Schoolwide Pool Overview Page

The Schoolwide Pool Overview page is displayed when the user clicks on *Schoolwide Pool* on the Consolidated Funding Application section page. In the Schoolwide Pool overview page, all the eligible school buildings in the district will be displayed. The user will allocate the appropriate amount for each participating building and indicate from which contributing title grant the funding is coming from.

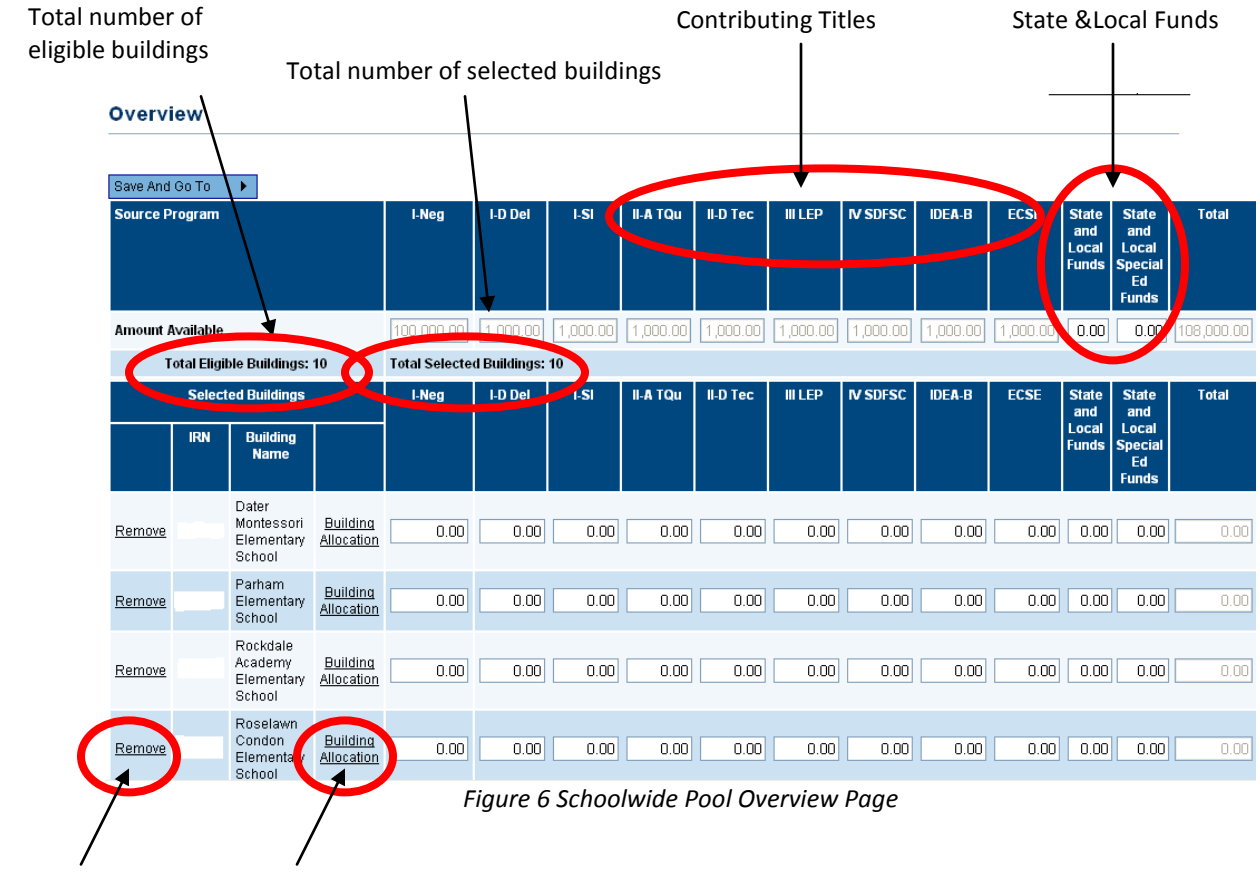


Figure 6 Schoolwide Pool Overview Page

Other functionalities provided in this page include:

4.1 Automatic Population of Contributing Amount

The amount available from each contributing source into the Schoolwide Pool will be automatically populated from the Allocations page. These gray-colored fields are NOT editable by the districts. The state and local funds fields are editable.

4.2 Allocating Local Funds

There are two text boxes where the user must allocate funds to the Schoolwide Pool from the state and local funding sources.

4.3 Automatic Calculation of Total Amount

System will populate the "Total" column, the "Total by Program" row and the "Amount Remaining" row dynamically as the user modifies funding information on the editable (non-grayed) cells on the overview page. These fields are NOT editable by users.

4.4 Remove a Building

Initially all the eligible buildings in the school district will be listed on the Schoolwide Pool page. The district has the capability to remove any schoolwide building from the Schoolwide Pool through REMOVE function. Once an "eligible" school is removed from the pool, the following actions will be performed:

- All the corresponding SW Pool grant funds for this "removed" school will be removed from the Schoolwide pool fund.
- Total Number of Eligible Buildings will remain same.
- Total Number of Selected Buildings will be reduced by 1.
- Total dollar figure amount by Program in the Schoolwide Pool will be adjusted appropriately (i.e. the total value for each grant will be reduced by corresponding dollar value that the removed buildings had).
- Total remaining amount will be adjusted appropriately (i.e. the remaining value for each grant will be increased by corresponding dollar value that the removed buildings had).
- If all the buildings are removed from the pool, the *Remove* link will be disabled.

4.5 Populating the Total Title I Building Allocation Amount

By clicking the "Building Allocation" button, the user can populate the Title I textbox with the total Title I building allocation amount for the corresponding building. This will allow the user to enter this amount without calculating it. The Title I building allocation button also displays a tool tip about the total Title I building allocation amount for the corresponding building.

4.6 Save Data in the System

Users can save all the changes by clicking the *Save and Go To* button. If the user enters any information that is against the Schoolwide Pool business rules, an error message will be displayed and user will not be able to save the changes.

4.7 Navigation to Related Pages

The user may go to the corresponding budget page for the Schoolwide Pool by using the *Save and Go To* button. Any changes in the Schoolwide Pool page will be saved when these buttons are pressed.

4.8 Business Rules

- The user must enter a state and local dollar amounts that will be contributed to the Schoolwide Pool from state and local funds for general and special education.
- The dollar amount cannot be negative or contain non-numeric characters in the editable cells.
- The amount remaining for any contributing title, including state and local funds, cannot be negative.
- For Title I, the entered amount must be greater than or equal to the total building allocation amount for the corresponding building.
- For each contributing title, including state and local funds, the district must spend at least 99.75 percent of the allocated amount.

5 Print Schoolwide Pool Page

The user can print the Schoolwide Pool information by clicking the *Print* link in the Consolidated Funding Application section.

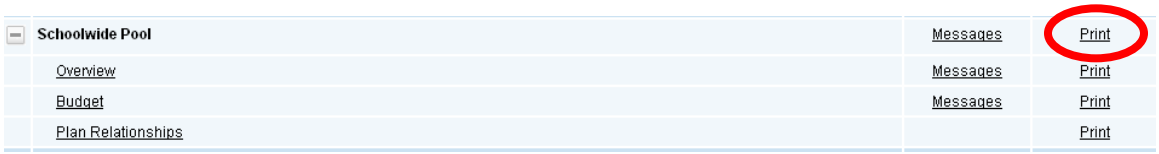
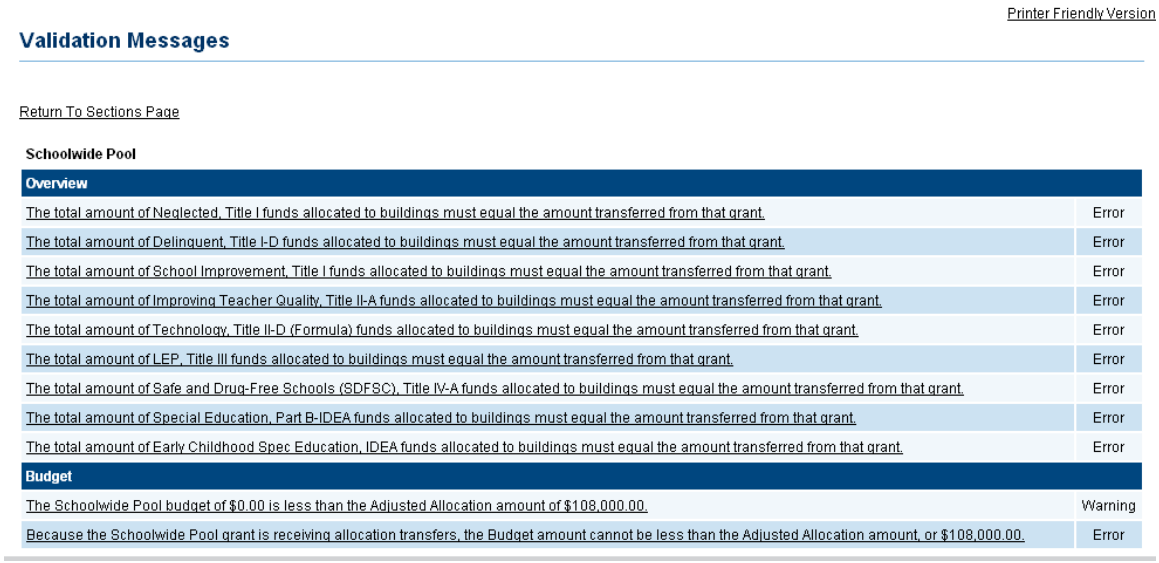


Figure 7 Print Schoolwide Pool Information

6 Schoolwide Pool Page Messages

The error/warning messages can be viewed by clicking the *Messages* link.



Printer Friendly Version

Validation Messages

Return To Sections Page

Schoolwide Pool

Overview	
The total amount of Neglected, Title I funds allocated to buildings must equal the amount transferred from that grant.	Error
The total amount of Delinquent, Title I-D funds allocated to buildings must equal the amount transferred from that grant.	Error
The total amount of School Improvement, Title I funds allocated to buildings must equal the amount transferred from that grant.	Error
The total amount of Improving Teacher Quality, Title II-A funds allocated to buildings must equal the amount transferred from that grant.	Error
The total amount of Technology, Title II-D (Formula) funds allocated to buildings must equal the amount transferred from that grant.	Error
The total amount of LEP, Title III funds allocated to buildings must equal the amount transferred from that grant.	Error
The total amount of Safe and Drug-Free Schools (SDFSC), Title IV-A funds allocated to buildings must equal the amount transferred from that grant.	Error
The total amount of Special Education, Part B-IDEA funds allocated to buildings must equal the amount transferred from that grant.	Error
The total amount of Early Childhood Spec Education, IDEA funds allocated to buildings must equal the amount transferred from that grant.	Error
Budget	
The Schoolwide Pool budget of $0.00 is less than the Adjusted Allocation amount of $108,000.00.	Warning
Because the Schoolwide Pool grant is receiving allocation transfers, the Budget amount cannot be less than the Adjusted Allocation amount, or $108,000.00.	Error

Figure 8 Validation messages for Schoolwide Pool

7 Schoolwide Pool Budget Page

On the Schoolwide Pool budget page, the user can budget the total Schoolwide Pool amount against the various OBJECT CODEs (e.g. salaries) and PURPOSE CODEs (e.g. Instruction). This page can be accessed from the Sections page by clicking on *Schoolwide Pool Budget*.

The Schoolwide Pool budget page looks and functions like all other CCIP budget pages.

Note: The adjusted allocation includes the allocations from the state and local funds and the contributing title(s) fund(s) on the allocation page.

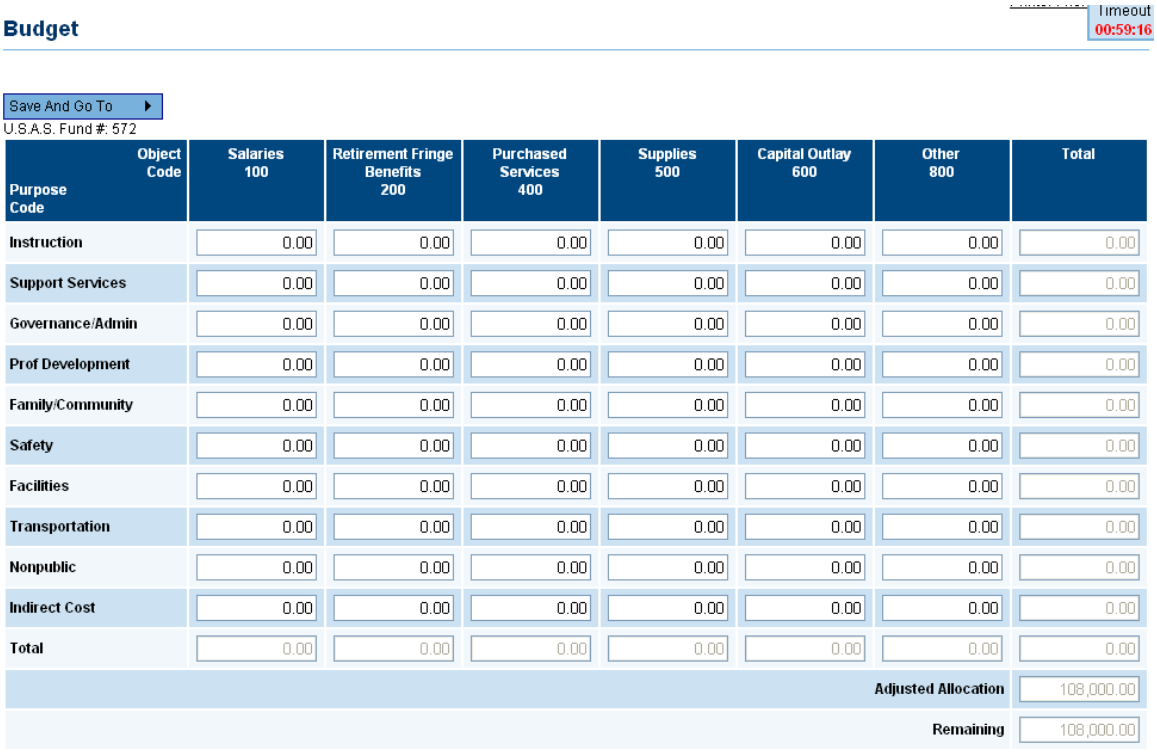


Figure 9 Schoolwide Pool Budget Page

- The user can save all the changes by clicking the *Save and Go To* button and click *Current Page*. If the user enters any information that is against the budget business rules, an error message will be displayed and user will not be able to save the changes.
- The user may move through the Consolidated Funding Application by utilizing the *Save and Go To* function.

Appendix - Schoolwide Pool Business Rules

- In order to create the Schoolwide Pool, the Title I must contribute funds to it.
- The adjusted Allocation for any contributing title can not be less than zero.
- If funds from a contributing title to SW Pool are withdrawn (i.e. change the transfer amount for SW Pool to $0), the corresponding SW Pool grant amount for this title will be removed from the Schoolwide Pool.
- In order to make a building eligible, the Service of the corresponding school must be set to either SW-EXIST or SW-NEW. This will allow the building to receive funding from the Schoolwide Pool.
- In order to make a building ineligible, the Service of the corresponding school must be set to either NONE or TA or COMP. If a building's eligibility status is changed from eligible to ineligible, all of the corresponding SW Pool grant funds for the building will be removed from the Schoolwide Pool.
- The user must enter a dollar amount that will be contributed from state and local funds.
- The dollar figure cannot be a negative value or a non-numeric character in the editable cells.
- The amount remaining for any contributing title including state and local funds cannot be negative.
- For Title I, the entered amount must be equal to or greater than the total Title I building allocation amount for the corresponding building.
- For each contributing title including local funds, the district must allocate to the buildings at least 99.75 percent of the funds placed in the pool.
- IDEA-B funds cannot exceed the PPA amount for the total number of special education students in the building population. In order to calculate the IDEIA-B PPA amount divide the total number of special education students in the district into the IDEA-B allocation.