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**eGMS**  
October 26, 2022

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# Agenda

- I. Common Errors
- II. Budgeting Guidance
- III. EIC Overview
- IV. Procurement
- V. Academic Recovery and Acceleration
- VI. Updates/Reminders
- VII. Question & Answer



# Believe to Achieve

The Department recently released [Believe to Achieve: Educational Priorities](#). This priorities plan serves as the Department's roadmap to improving outcomes for all Louisiana children.

*Believe to Achieve* includes the Department's new belief statements, state data to help track progress toward Louisiana's six critical goals, and the new priorities that will direct the LDOE's efforts as they work toward achieving the critical goals. Each priority outlines focus areas for the key actions and initiatives.

**ACCESS**

*Believe to Achieve*

## Common Errors





# Common Errors

- **Indirect Cost Rate (IDC)**
  - Derived Rate not the same as Approved Rate of IDC
    - MAX IDC not budgeted
    - Changes in IDC amount budgeted
- **Periodic Expenditure Reports**
  - Late or lack of submission until end of application cycle
  - Lack of “Final” checkmark
- **Property/Equipment: Software**
  - Software subscriptions of over \$5,000: should be budgeted to Object Code 500 since the software is not owned.
  - Software over \$5,000: should be budgeted to Object Code 700.

# Common Errors

- **Fees paid on behalf of the student:**
  - Examples: ACT Voucher, school fees, CTE exams, etc
  - These should use Object Code 500
- **Employees Benefits: Object Code 200**
  - Payment made to the individual or to the university on behalf of the employees for tuition
  - Testing and certification Fees
  - These should use Object Code 200
- **Temporary housing**
  - Rental of a house should be coded to Object Code 400
  - Rental of hotel room should be coded to Object Code 500



# Common Errors

- **Virtual PD versus On-site PD**
  - **Virtual PD:** only the instances where the LEA is purchasing “canned” modules where staff complete at their convenience; self-paced (Object Code 500)
  - **On-Site PD:** payment for PD whether the consultant is traveling to the LEA site or delivering via Zoom, Go-To, etc. (Object Code 300)
  - **Travel for PD:** Travel for staff to attend PD/Trainings, should include the number of attendees and associated costs such as registration, airfare, lodging, meals, etc. (Object Code 500)
- **Lack of clarity on what is being purchased**
  - Example: activities to foster parent engagement
    - identify what is being purchased



# Budgeting Guidance



# Need: PD for Staff for an Initiative or Program

What is the best way for this professional development to occur?

What options are available for the professional development?

What benefits are derived from the method(s) chosen?

- Cost
- Benefit
- Outcomes
- Goals

## PD Designed for the LEA's Needs

1. Training is designed in partnership between the LEA and the vendor.
2. The LEA has input into the method of delivery. For example, the presenter may present on-site or by a meeting platform such as Zoom, MS Teams, GoToMeeting, WebEx, etc.
3. The LEA and the presenter/vendor agree to the terms including the number and length of sessions, the rate per session, number of participants, and any additional components such as an evaluation.

300

23

PD for Tier 1 ELA provided by Vendor (4 sessions x \$1200 ea.)

4,800



# Self-Paced (Canned) Training

1. Training modules have been developed by the vendor.
2. The LEA has no input into the method of delivery.
3. The vendor has determined the instructional objectives, content, and evaluation pieces.
4. The LEA purchases access or licenses for access to the training modules, which are typically delivered online.
5. Participants can access the training modules on their schedule.

500

23

PD for Tier 1 ELA provided by Vendor (3 annual licenses x \$900)

2,700

## Conference or Workshop PD

1. The PD occurs off-site.
2. The conference/workshop topics, dates, and location are determined by the vendor, professional association, consultant.
3. Travel to the conference or workshop, in-state or out-of-state, is necessary.

500

23

**4 Instructional Specialists to attend PD for Tier 1 ELA at Vendor Workshop in Chicago (Registration \$350; Lodging \$950; Airfare \$500; Meals \$100)**

7,600



# Need: Student Well-Being Initiative

One of the LEA's schools has determined that additional support is needed for student well-being. The school has requested funds to implement their program and is calling it "Fantastic Fridays."

# Need: Student Well-Being Initiative

600

51

~~Pelican Harbor ES: Fantastic Fridays~~\_\_\_\_\_

5,000

From a fiscal review viewpoint: what is being purchased?

\_\_\_\_\_ Break the initiative into its budgeted components

- PT Mental Health Counselor/LEA Employee:  
Codes 100/200
- Contracted Professional Services (sessions and/or hourly rates) Code 300
- Materials and Supplies (include examples)  
Code 600



# Capital Expenditure Reminders

- Federal capitalization threshold for equipment is currently \$5,000.
  - Equipment is coded to 700 and must meet the following criteria:
    - It can be expected to serve its principal purpose for at least one year
    - It is nonexpendable; can be repaired without being replaced
    - The item does not lose its identity through fabrication or incorporation into a different or more complex unit
  - If the LEA's capitalization threshold is lower, state this in the description to avoid a fiscal review request to recode to 600

# Capital Expenditure Reminders

Certain expenditure requests require the use of the Pre-Approval Process:

- General equipment purchases (vans, buses, portable buildings, etc.)
- Land purchases
- Building purchases
- Improvements to general equipment, land, and/or buildings that increase the value or use life

# Travel Policy: What is PPM 49

- Travel (federal funds)
  - CFR 200.475 - Travel expenses incurred by employees who are in travel status on official business of the non-Federal entity.
    - Transportation
    - Lodging
    - Subsistence
    - Related items incurred by employees
- In the absence of an LEA travel policy, travel defaults to:
  - Louisiana Division of Administration [PPM 49 - Travel Guide](#)
  - State's general travel regulations
  - Most recent update was effective October 1, 2022
    - If local policy rates are lower, then the local rate applies.



# Educational Improvement Categories (EIC) Overview



# EIC Overview

- “Description of Educational Improvement Categories (EIC) and Object Code” is located on each Budget Detail page in all applications.
- EIC code should align this the activity/initiative being budgeted
- Note: Use of the “CAPIMP” EIC will exclude the expenditure from MTDC.

**Title I**

EIC #	Education Improvement Category
11	Instruction
11 HC	Homeless
11 EL	EL
11 ND	Neglected and Delinquent
11 IP	Instructional Program (District Wide)
11 CUIS	CIR and UIR School Support
11 SB	School Budget
12	Remediation
12 HC	Homeless
12 EL	EL
12 ND	Neglected and Delinquent
12 IP	Instructional Program (District Wide)
12 CUIS	CIR and UIR School Support
12 SB	School Budget
14	Pre-School Instruction
14 SB	School Budget
14 PS	Pre-School

EIC #	Education Improvement Category
24 SB	School Budget
24 PD	Professional Development
24 ADM	Administration
31	Parental / Family Involvement
31 HC	Homeless
31 EL	EL
31 ND	Neglected and Delinquent
31 CUIS	CIR and UIR School Support
31 SB	School Budget
31 DL	District Level Parent and Family Engagement
31 SL	School Level Parent and Family Engagement
32	School and Community Support
32 HC	Homeless
32 EL	EL
32 ND	Neglected and Delinquent
32 IP	Instructional Program (District Wide)
32 CUIS	CIR and UIR School Support



# Procurement



# Methods of Procurement CFR 200.320

- Grantee must have and use documented procurement procedures for the following methods:
  - Informal procurement methods
    - Micro-purchase
    - Small purchase procedures
  - Formal procurement methods
    - Competitive sealed bids
    - Competitive proposals
  - Noncompetitive proposals

# Informal Procurement, CFR 200.320(a)(1) - Micro-purchases

- Distribution: “To the maximum extent practicable, the non-federal entity should distribute ... among qualified suppliers.”
- Awards: May be awarded without price or rate quotes if non-federal entity “considers the price to be reasonable based on research, experience, purchase history or other information and documents its files accordingly.”
- Thresholds: Determined and documented by grantee, based on internal controls, risk, and procedures. Authorized by state, local laws. (\$10,000).



# Informal Procurement, CFR 200.320(a)(2) - Small Purchases

- Used for purchases greater than micro-purchase threshold, but less than simplified acquisition threshold (\$250,000).
- Price or rate quotations from “adequate number of qualified sources” as determined appropriate by non-federal entity
- Thresholds: Established based on internal controls, risk and procedures, and documented. Cannot exceed the threshold in FAR (\$250,000) but may be lowered.



# Formal Procurement, CFR 200.320(b)

- Used for purchases that exceed small purchase threshold (\$250,000, or lower, if set by the non-federal entity)
  - Require documented procedures
  - Require public advertising
- Two options:
  - Sealed bids
  - Proposals

# Formal Procurement, CFR 200.320(b) (cont'd)

## Sealed Bids used when:

- A complete, adequate, and realistic specification or purchase description is available
- Two or more responsible bidders are willing and able to compete effectively
- The procurement lends itself to a firm, fixed-price contract and selection is principally based on cost.

Request for Proposal used when the item to be purchased or the services to be rendered are difficult to describe:

- Must have a written method for conducting technical evaluations of proposals and making selections.
- Contract is awarded to vendor whose proposal is most advantageous considering price and other factors.



# **Academic Recovery and Acceleration Plan (ARAP)**





# ARAP

## 2022-23 Academic Recovery and Acceleration Plans (ARAP)

- Academic Recovery and Acceleration Plans (ARAP) were due September 30, 2022.
- If you have not yet submitted your plan:
  - Create the Academic Recovery Plan application in Fiscal Year 2023 in eGMS
    - Complete the Contact and Assurance information in Fiscal Year 2023 in eGMS (located under the Formula Contacts and Formula Assurances)
    - Scroll down to the “Available Ribbon” and select “Create”
  - Upload the LEA’s ARAP in the application and submit for review
- The ARAP reviews are following the eGMS review process
  - Academic Recovery and Acceleration Plans will go through a two level review process
  - Reviewers will complete the Level II reviews no later than December 16, 2022.
  - Any revisions needed for the plan will be identified in the reviewer comments.
  - LEAs will need to submit any corrections required within 4-5 business days



## **Grants Management: Updates/Reminders**



# Updates/Reminders

## 2023-24 School Year

- **Super App Submission:** January 27, 2023 (competitive portion only - no budgets)

## 2022-23 School Year

- **9/30 PERs**
  - Submission deadline: November 15, 2022
- **Title I Excess Funds**
  - 9/30 PER determines “Excess Funds” - **must** submit the PER on or before 11/15/2022
- **DSS Funding:** no new 2022-23 DSS Funding. DSS rollover funding is displayed under Prior Year on the Allocations tab in Super App.



# Updates/Reminders

## 2022-23 School Year

- **Redesign 1003a Funding**
  - 2021 Funding: should have been expended by 9/30/2022. Claims must be submitted on or before November 15, 2022
  - 2022 Funding: any expenditures that occurred on or before 9/30/22 should be submitted by November 15, 2022
- **eGMS FIFO of funding**
  - Once 6/30 PER is approved and prior year funds are visible in the Super App, the system will automatically use the oldest funding.

# Updates/Reminders

## 2022-23 School Year

- **Expiring Funds:**
  - Submit claims for at least the amount of the expiring funds amount no later than November 15, 2022. All expenditures must have occurred on or before September 30, 2022.
  - ESSA/IDEA: will need to submit your 9/30 PER by November 15, 2022
  - ESSER I: will need to submit your 9/30 PER marked as Final by November 15, 2022
    - If the LEA anticipates an unexpended balance for \$100,000 or more, please notify LDOE via [LDOE.GrantsHelpdesk@la.gov](mailto:LDOE.GrantsHelpdesk@la.gov). Subject Line: Unexpended ESSER I Funds



# Updates/Reminders

## Recently released applications:

- **2023-24**
  - LEA Central Data
  - 2023-24 Super App
- **2022-23**
  - Strong School Systems
  - REAL Consolidated
  - School Nurses Behavioral Health: Final 9/30 PER must be submitted for balance to roll forward
  - SPED Cameras
    - Respond to data questions on the Supporting Documentation tab
    - Upload the LEA SPED Camera Policy
    - Complete Budget Detail and submit for approval
    - **NOTE:** Additional data collection in late spring - amendment required. Data will include: Number of cameras purchased/installed, Total amount expended, Remaining balance and Upload of receipts for cameras purchased/installed this school year.



# Updates/Reminders

## Upcoming Application Releases:

- Nonpublic Textbook
- Nonpublic Textbook Admin
- Nonpublic Salary Supplement
- High Cost Services Round 1
- These applications will release in the near future. An update will be provided on the eGMS Login Page once the application is released.

## eGMS Changes:

- **Application Status:** if an application is “Accepted with Comment” this language will display in the “Status” column.
- **eGMS Notifications:** we are currently working with the developer on additional notifications such as “PER Not Submitted”. Projected date for inclusion of additional notifications is end of December.

# Updates/Reminders

## Applications

- If application is returned for change, resubmit in a timely manner to avoid disruption of reimbursement claims.
- If award amounts change, an amendment should be submitted within 90 days of the change in order to not stop the reimbursement process
- If an application is in an unlocked posture (returned for change or an open amendment), reimbursement claims cannot be submitted.

## Reimbursement Claims

- Claims should be submitted at least on a monthly basis. This practice not only provides timely reimbursement, but also reflects positively on the LEA for drawdown of funds.
- PER submitted quarterly within 15 days of the PER date.



# Achieve! Updates

## ESSER II & III Incentive Flexibility

### Learning Loss Initiatives

	Original	Fund Expiration	ACT NOW	Alternative Ed. Curriculum Support	Balanced Calendar	Community Service App	Drop Out Early Warning Systems	IGP Partners	IGP - Electronic Hosting Service	Literacy Foundations Training	Ninth Grade Academy	Pre-ACT NOW	Source Totals
Learning Loss ESSER II Total	\$15,000	9/30/23	\$5,000						\$5,000			\$5,000	\$15,000
Learning Loss ESSER III Total	\$50,000	9/30/24			\$50,000								\$50,000
Community Service App ESSER III Total	\$5,000	9/30/24				\$5,000							\$5,000
Initiative Totals			\$5,000	\$0	\$50,000	\$5,000	\$0	\$0	\$5,000	\$0	\$0	\$5,000	

[Sample Achieve! Approval & Funding Summary document](#)

Contact [LDOE.GrantsHelpdesk@la.gov](mailto:LDOE.GrantsHelpdesk@la.gov) with questions.



# The ESSER Annual Performance Report

Annual Report	Applicable Reporting Period
Year 2 Annual Report	October 1, 2020 - End of State Fiscal Year 2021
Year 3 Annual Report	State Fiscal Year 2022
Year 4 Annual Report	State Fiscal Year 2023*

## ESSER II under the Coronavirus Response and Relief Supplemental Appropriations (CRRSA) Act

Annual Report	Applicable Reporting Period
Year 1 Annual Report	State Fiscal Year 2021
Year 2 Annual Report	State Fiscal Year 2022
Year 3 Annual Report	State Fiscal Year 2023
Year 4 Annual Report	State Fiscal Year 2024*

## ARP ESSER under the American Rescue Plan (ARP) Act

Annual Report	Applicable Reporting Period
Year 1 Annual Report	State Fiscal Year 2021
Year 2 Annual Report	State Fiscal Year 2022
Year 3 Annual Report	State Fiscal Year 2023
Year 4 Annual Report	State Fiscal Year 2024
Year 5 Annual Report	State Fiscal Year 2025*

# Communication Resources

- eGMS Logon Page
  - Announcements
  - Timelines
  - Notices
- [FSGR Library](#)
  - ARP
  - EANS
  - Pandemic Relief
  - Funding Guidance
  - Monthly Call Decks
- [LDOE Newsletters](#)
- FSGR Monthly Call
  - Third Thursday of every month at 10:00 am
  - [Zoom link](#)

Suggested participants for the  
Monthly Call:

- Federal Program Supervisors
- IDEA Supervisors
- Business Managers

# Question & Answer





# Contact Information

For more information or questions contact:

LDOE Grants Management Helpdesk

[ldoe.grantshelpdesk@la.gov](mailto:ldoe.grantshelpdesk@la.gov)

Federal Support and Grantee Relations

Bernell Cook

[bernell.cook@la.gov](mailto:bernell.cook@la.gov)

Randy Littleton

[randy.littleton@la.gov](mailto:randy.littleton@la.gov)

Federal Support

Kenya Jenkins

[kenya.jenkins@la.gov](mailto:kenya.jenkins@la.gov)

Statewide Monitoring

Angela Randall

[angela.randall@la.gov](mailto:angela.randall@la.gov)

Grants Management

Susan Andre

[susan.andre@la.gov](mailto:susan.andre@la.gov)