



Federal Programs Department
Plan4Learning ESSA and State Compensatory Education
Budget Resource Guide - Departments
School Year 2018-2019

As per Federal & State regulations, funding is to be used for items (programs, strategies, activities, etc.) that are in the DIP and address a need that was identified in the CNA. The CNA, DIP, Department Budget Worksheets and supporting documentation (2018-2019 Consolidated Federal Grant Application) are audit documents that provide the justification for use of Every Student Succeeds Act (ESSA) and State Compensatory Education (SCE) Funds.

Below is what will need to be included in Plan4Learning to meet these Federal and State regulations. Plan4Learning terminology is used in order to better assist you in navigating the Plan4Learning software.

Note: The Office of School Improvement has required the use of “Multiple Measures of Data” focus areas for the 2018-19 school year. The NCLB Recommended Areas for your CNA will no longer be used.

Under Needs Assessment (CNA)

- To be included in the 2018-19 budget, select a “Multiple Measures of Data” focus area(s) that will be used to identify department needs. A written “Problem Statement” and “Root Cause” are required within the focus area(s) selected. The Problem Statement and Root Cause are used to identify the “Multiple Measures of Data” focus area department needs. Once the “Multiple Measures of Data” for the CNA are selected and the required Problem Statements with Root Causes are written, then the DIP needs to be detailed under the “Goals” section. This is where the (CNA) Problem Statement is aligned with the (DIP) Goal, Performance Objective, Strategy and Funding Source.

Classic Theme

Home Needs Assessment Goals State Compensatory Title I Plan Checklist Plan Notes Committees Print/View

plan4learning.com

Change School: Change Year: 2017-2018

2017-2018 Comprehensive Needs Assessment

Data Analysis Area: Select Area

- Select Area
- NCLB Recommended Areas**
- Demographics
- Student Achievement
- School Culture and Climate
- Staff Quality, Recruitment, and Retention
- Curriculum, Instruction, and Assessment
- Family and Community Involvement
- School Context and Organization
- Technology
- Multiple Measures of Data**
- Demographics
- Student Academic Achievement
- School Processes & Programs
- Perceptions
- Optional
- Needs Assessment Overview

New

Where did my needs go?
Click here for details on Needs being replaced by Problem Statements.

Plan4Learning Problem Statement Examples
Click here to download the Plan4Learning Problem Statement Examples.

Problem Statement:
Root Cause:

✓ Save Problem Statements + Add Problem Statement



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New Theme

- Write at least one “Problem Statement” with Root Cause in the “Multiple Measures of Data”.



Problem Statements Identifying Demographics Needs

Problem Statement	:	<input type="text"/>
Root Cause	:	<input type="text"/>



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Under Goals (DIP)

- The Department Improvement Plan serves as the blueprint for how the department will actually address the needs identified in your CNA.
- Once the Performance Objective have been added or selected under a Goal, at least one strategy must be written that aligns with the Goal & Performance Objective and also identifies the fund number, resource needed and the funding amount. (Optional: utilize the account code field to produce a more robust department budget report).
- The strategy and strategy funding must align with the CNA “Problem Statement(s)” and “Root Cause” that were written in the “Multiple Measures of Data” focus area identifying department needs.
 - Note: Above the “Strategy Funding” section, click on the “Add Problem Statements” so that a problem statement(s) can be selected from the drop down window that aligns with the strategy. This serves to document that the DIP activity addresses a need identified in the CNA and supports the eligibility of the expenditure.

Classic Theme

Problem Statements

No problem statements yet.

[✓ Add Problem Statements](#)

Strategy Funding

Resources Needed:

245 – ESEA Title I, 1003(a) - Priority and Focus 245-11-6118-24-xxx-9-30-000 \$ 1350.00 ✘

Strategy Funding			*Amount cannot be zero \$0
Resources Needed	Fund Source	Account Code	Description/Used For
<i>Enter in Plan4Learning “Resources Needed” under 245 – ESEA Title I, 1003(a) strategies</i>		<i>Optional to enter in Plan4Learning, however, utilizing the account code field will produce more sophisticated campus reports. xxx = your campus org</i>	<i>Examples of items that fall under the budget code</i>
Teachers/Extra Duty	245-Title I, 1003(a)	245-11-6118-24-xxx-9-30-000	Extra duty (Non Contract) for a Teacher to assist in implementing interventions and improve the learning process for all students For wages paid to employees for performing duties that are not part of the regular contract i.e., after school tutoring, summer school and extra duties.



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New Theme

Problem Statements:

Add Problem Statements

Funding Sources:

Resources Needed:

245 - ESEA Title I, 1003(a) - Priority and Focus > 245-11-618-24-xxx-9-30-000 Optional \$ *

Add Fund Source

*Amount cannot be zero \$0

Strategy Funding			
Resources Needed	Fund Source	Account Code	Description/Used For
<i>Enter in Plan4Learning "Resources Needed" under 245-ESEA Title I, 1003(a) strategies</i>		<i>Optional to enter in Plan4Learning, however, utilizing the account code field will produce more sophisticated department reports. xxx = your department org</i>	<i>Examples of items that fall under the budget code</i>
Teachers/Extra Duty	245-ESEA Title I, 1003(a)	245-11-6118-24-xxx-9-30-000	Extra Duty (Non Contract) for a Teacher to assist in implementing interventions and improve the learning process for all students. For wages paid to employees for performing duties that are not part of the regular contract i.e., after school tutoring, summer school and extra duties.



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Department (211,212,214,215,216,255,263,287,164) Staffing Allocations			
<i>Non-Discretionary Positions (FTE's)</i>			
Resources Needed	Fund Source	Account Code	Description/Used For
ORG-Supplemental Professional Positions	2xx-ESSA 164-State Compensatory	2xx-xx-6119-xx-xxx-9-2x-000 164-xx-6119-xx-xxx-9-2x-000	Eligible supplemental professional positions assigned to your department.
ORG-Supplemental Secretary/Clerk	2xx-ESSA 164 State Compensatory	2xx-xx-6129-xx-xxx-9-2x-000 164-xx-6129-xx-xxx-9-2x-000	Eligible supplemental secretary/clerk positions assigned to your department.

Departments (211,212,214,215,255,263,287,164) 2017-2018 Grant Packet			
<i>Budget - Worksheet Allocation</i>			
Resources Needed	Fund Source	Account Code	Description/Used For
ORG-Substitute Teachers	2xx-ESSA 164-State Compensatory	2xx-11-6112-02-xxx-9-2x-000 164-11-6112-02-xxx-9-xx-xxx	Substitute teachers to conduct instructional activities outlined by teacher, maintain regular classroom schedule when teacher is attending eligible professional development.
ORG-Certified Retired Teachers (Bilingual)	2xx-ESSA 164-State Compensatory	2xx-11-6118-23-xxx-9-2x-000 164-11-6118-23-xxx-9-xx-xxx	Extra duty (Non Contract) for a Teacher to assist in implementing interventions and improve the learning process for all students. For wages paid to employees for performing duties that are not part of the regular contract i.e., CRTs for bilingual classroom
ORG-Teachers (Extra-Duty/PD)	2xx-ESSA 164-State Compensatory	2xx-13-6118-24-xxx-9-2x-xxx 164-13-6118-24-xxx-9-xx-xxx	Extra duty (Non Contract) for a Teacher to attend professional development to assist in implementing interventions and improve the learning process for all students. For wages paid to employees for performing duties that are not part of the regular contract i.e., after school training, summer training and eligible extra professional development duties.
ORG-Other Non-Campus (Extra-Duty/Part-Time) Secretary/Clerk	2xx-ESSA 164-State Compensatory	2xx-xx-6124-xx-xxx-9-2x-xxx 164-xx-6124-xx-xxx-9-xx-xxx	Extra duty – Part-Time (Non Contract days) for a secretary/clerk to work beyond regular contract and duty hours on eligible supplemental activities.
ORG-Region 20 Services for Instructional Services	2xx-ESSA 164-State Compensatory	2xx-11-6239-00-xxx-9-2x-xxx 164-11-6239-00-xxx-9-xx-xxx	Services provided by an Education Service Center (ESC) i.e., student data services and instructional supplies
ORG-Region 20 Services for Professional Development Teacher	2xx-ESSA 164-State Compensatory	2xx-13-6239-00-xxx-9-2x-xxx 164-13-6239-00-xxx-9-xx-xxx	Professional Development Services for Teachers provided by an Education Service Center (ESC)
ORG-Region 20 Services for Professional Development Principal	2xx-ESSA 164-State Compensatory	2xx-2x-6239-00-xxx-9-2x-xxx 164-2x-6239-00-xxx-9-xx-xxx	Professional Development Services for Principal and Assistant Principal provided by an Education Service Center (ESC)
ORG-Consultant Services for Instructional Services	2xx-ESSA 164-State Compensatory	2xx-11-6291-00-xxx-9-2x-xxx 164-11-6291-00-xxx-9-xx-xxx	Contracts with non ESC consultants for instructionally related services



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ORG-Consultants for Professional Development	2xx-ESSA 164-State Compensatory	2xx-xx-6291-00-xxx-9-2x-xxx 164-xx-6291-00-xxx-9-xx-xxx	Consultants with non ESC for professional development for Teachers, Admin., etc.
ORG-Contracted Services, Printing Services	2xx-ESSA 164-State Compensatory	2xx-11-6299-00-xxx-9-2x-xxx 164-11-6299-00-xxx-9-xx-xxx	Non-Professional Contracted Services-meaning expenditures for miscellaneous contracted services not specified somewhere else <i>Used for instructional resources</i> i.e., benchmark printing, summer packets.
ORG-Printing Services (State Assessment)	2xx-ESSA 164-State Compensatory	2xx-31-6299-00-xxx-9-2x-xxx 164-31-6299-00-xxx-9-xx-xxx	Printing of State Assessment materials (STAAR)
ORG-Magazines and Periodicals	2xx-ESSA 164-State Compensatory	2xx-11-6325-00-xxx-9-2x-xxx 164-11-6325-00-xxx-9-xx-xxx	To classify all expenditures/expenses for magazine subscriptions and newspaper subscriptions that are placed in classrooms, offices, or libraries in print only
ORG-Magazines and Periodicals (on-line)	2xx-ESSA 164-State Compensatory	2xx-11-6325-65-xxx-9-2x-xxx 164-11-6325-65-xxx-9-xx-xxx	To classify all expenditures/expenses for magazine subscriptions and newspaper subscriptions that are placed in classrooms, offices, or libraries whether in print and electronic format (on-line)
ORG-Reading Materials	2xx-ESSA 164-State Compensatory	2xx-11-6329-00-xxx-9-2x-xxx 164-11-6329-00-xxx-9-xx-xxx	Reference books and other reading materials <i>not cataloged by the library</i> that are placed in classrooms
ORG-Reading Materials (on-line)	2xx-ESSA 164-State Compensatory	2xx-11-6329-65-xxx-9-2x-xxx 164-11-6329-65-xxx-9-xx-xxx	Reference books and other reading materials <i>not cataloged by the library</i> that are placed in classrooms (on-line)
ORG-Library Books & Media	2xx-ESSA 164-State Compensatory	2xx-12-6329-00-xxx-9-2x-xxx 164-12-6329-00-xxx-9-xx-xxx	Instructional Resource & Media Service cataloged by the library (less than \$5,000) Function "12" used for expenditures/expenses that are directly and exclusively used for a campus resource center and maintaining campus libraries.
ORG-Library Books & Media (on-line)	2xx-ESSA 164-State Compensatory	2xx-12-6329-65-xxx-9-2x-xxx 164-12-6329-65-xxx-9-xx-xxx	Instructional Resource & Media Service cataloged by the library (less than \$5,000) Function "12" used for expenditures/expenses that are directly and exclusively used for a campus resource center and maintaining campus libraries. (on-line)
ORG-Reading Materials (PD)	2xx-ESSA 164-State Compensatory	2xx-xx-6329-00-xxx-9-2x-xxx 164-xx-6329-00-xxx-9-xx-xxx	Reference books and other reading materials for Professional Development. Use appropriate function number for participant.
ORG-Reading Materials (on-line for PD)	2xx-ESSA 164-State Compensatory	2xx-xx-6329-65-xxx-9-2x-xxx 164-xx-6329-65-xxx-9-xx-xxx	Reference books and other reading materials for Professional Development. Use appropriate function number for participant. (on-line)
ORG-Other Testing Materials	2xx-ESSA 164-State Compensatory	2xx-11-6339-00-xxx-9-2x-xxx 164-11-6339-00-xxx-9-xx-xxx	Other testing material/ expenditures for testing material including test booklets i.e., non-state assessments materials. <i>Do not use for STAAR materials or STAAR related materials</i>



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Resources Needed	Fund Source	Account Code	Description/Used For
ORG-State Assessments related materials	2xx-ESSA 164-State Compensatory	2xx-31-6339-00-xxx-9-2x-xxx 164-31-6339-00-xxx-9-xx-xxx	State Assessment materials (STAAR) related materials
ORG-State Assessments related materials (on-line)	2xx-ESSA 164-State Compensatory	2xx-31-6339-65-xxx-9-2x-xxx 164-31-6339-65-xxx-9-xx-xxx	State Assessment materials (STAAR) related materials (on-line)
ORG-Supplies-Teaching General Supplies Instructional	2xx-ESSA 164-State Compensatory	2xx-11-6399-00-xxx-9-2x-xxx 164-11-6399-00-xxx-9-xx-xxx	Supplemental instructional teaching materials and supplies
ORG-Supplies-Supplies for Professional Development (teachers, implementation specialists)	2xx-ESSA 164-State Compensatory	2xx-13-6399-00-xxx-9-2x-xxx 164-13-6399-00-xxx-9-xx-xxx	Supplemental professional development materials and supplies for teachers, implementation specialists
ORG-Supplies- Supplies for Professional Development	2xx-ESSA 164-State Compensatory	2xx-23-6399-00-xxx-9-2x-xxx 164-23-6399-00-xxx-9-xx-xxx	Supplemental professional development materials and supplies for department administrators
ORG-Laptops, tablets, printers, etc. (Hot Items Supplies)	2xx-ESSA 164-State Compensatory	2xx-xx-6399-27-xxx-9-2x-xxx 164-xx-6399-27-xxx-9-xx-xxx	Supplies that must be tracked/tagged are considered a Hot Item i.e., Computers & Laptop, Printers, Tablets, I-Pad
ORG-Technology (Projectors, scanners, online subscriptions)	2xx-ESSA 164-State Compensatory	2xx-xx-6399-65-xxx-9-2x-xxx 164-xx-6399-65-xxx-9-xx-xxx	Supplies that need to be approved by Technology for district compatibility and support i.e., digital microscopes, scanners, projectors, monitors, software, online subscriptions, document cameras, etc.
ORG-Supplies-Counselor	2xx-ESSA 164-State Compensatory	2xx-31-6399-00-xxx-9-2x-xxx 164-31-6399-00-xxx-9-xx-xxx	<u>Supplemental Supplies and materials</u> for the counselor for instructional purposes
ORG-Books-Counselor	2xx-ESSA 164-State Compensatory	2xx-31-6329-00-xxx-9-2x-xxx 164-31-6329-00-xxx-9-xx-xxx	<u>Supplemental books</u> for the counselor for instructional purposes
ORG-Supplies-Parent and Family Engagement	2xx-ESSA	2xx-61-6399-00-xxx-9-2x-xxx	Use for Supplies and materials for building a parent program to increase parental & community involvement, organize family related activities to keep parents informed and involved for instructional related purposes
ORG-Travel –Librarian	2xx-ESSA 164-State Compensatory	2xx-12-6411-00-xxx-9-2x-xxx 164-12-6411-00-xxx-9-xx-xxx	Does Not require TEA approval. In-State Travel for Librarians - transportation, meals, room, and other expenses associated with traveling on official school business. It includes registration fees for attending conferences, seminars, professional development.



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ORG-Travel – Librarian Out of State (OS) **	2xx-ESSA 164-State Compensatory	2xx-12-6411-OS-xxx-9-2x-xxx 164-12-6411-OS-xxx-9-xx-xxx	<u>2xx Requires requisition and TEA approval prior to payment and traveling.</u> <i>Out-of-State Travel for Librarians</i> - transportation, meals, room, and other expenses associated with traveling on official school business. It includes registration fees for attending conferences, seminars, professional development
ORG-Travel -Teachers and other Instructional Support Personnel	2xx-ESSA 164-State Compensatory	2xx-13-6411-00-xxx-9-2x-xxx 164-13-6411-00-xxx-9-xx-xxx	<u>Does Not require TEA approval.</u> <i>In-State Travel</i> - transportation, meals, room, and other expenses associated with traveling on official school business. It includes registration fees for attending conferences, seminars, professional development. (Teachers, Implementation Specialists and other Core Staff)
ORG-Travel -Teacher and other Instructional Support Personnel Out of State (OS) **	2xx-ESSA 164-State Compensatory	2xx-13-6411-OS-xxx-9-2x-xxx 164-13-6411-OS-xxx-9-xx-xxx	<u>2xx Requires requisition and TEA approval prior to payment and traveling.</u> <i>Out-of-State Travel</i> - transportation, meals, room, and other expenses associated with traveling on official school business. It includes registration fees for attending conferences, seminars, professional development (Teachers, Implementation Specialists and other Core Staff)
ORG-Travel -Instructional Leadership	2xx-ESSA 164-State Compensatory	2xx-21-6411-00-xxx-9-2x-xxx 164-21-6411-00-xxx-9-xx-xxx	<u>Does Not require TEA approval.</u> <i>In-State Travel for Instructional Leadership</i> - transportation, meals, room, and other expenses associated with traveling on official school business. It includes registration fees for attending conferences, seminars, professional development
ORG-Travel -Instructional Leadership Out of State (OS) **	2xx-ESSA 164-State Compensatory	2xx-21-6411-OS-xxx-9-2x-xxx 164-21-6411-OS-xxx-9-xx-xxx	<u>2xx Requires requisition and TEA approval prior to payment and traveling.</u> <i>Out-of-State Travel for Instructional Leadership</i> -transportation, meals, room, and other expenses associated with traveling on official school business. It includes registration fees for attending conferences, seminars, professional development
ORG-Travel -Principal/Assistant Principal	2xx-ESSA 164-State Compensatory	2xx-23-6411-00-xxx-9-2x-xxx 164-23-6411-00-xxx-9-xx-xxx	<u>Does Not require TEA approval.</u> <i>In-State Travel for Principal and Assistant Principal</i> - transportation, meals, room, and other expenses associated with traveling on official school business. It includes registration fees for attending conferences, seminars, professional development



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ORG-Travel- Principal/Assistant Principal Out of State (OS) **	2xx-ESSA 164-State Compensatory	2xx-23-6411-OS-xxx-9-2x-xxx 164-23-6411-OS-xxx-9-xx-xxx	<u>2xx Requires requisition and TEA approval prior to payment and traveling.</u> <i>Out-of-State Travel for Principal and Assistant Principal</i> -transportation, meals, room, and other expenses associated with traveling on official school business. It includes registration fees for attending conferences, seminars, professional development
ORG-Travel –Counselor	2xx-ESSA 164-State Compensatory	2xx-31-6411-00-xxx-9-2x-xxx 164-31-6411-00-xxx-9-xx-xxx	<u>Does Not require TEA approval.</u> <i>In-State Travel for Counselors</i> - transportation, meals, room, and other expenses associated with traveling on official school business. It includes registration fees for attending conferences, seminars, professional development.
ORG-Travel –Counselor Out of State (OS) **	2xx-ESSA 164-State Compensatory	2xx-31-6411-OS-xxx-9-2x-xxx 164-31-6411-OS-xxx-9-xx-xxx	<u>2xx Requires requisition and TEA approval prior to payment and traveling.</u> <i>Out-of-State Travel for Counselors</i> - transportation, meals, room, and other expenses associated with traveling on official school business. It includes registration fees for attending conferences, seminars, professional development
ORG-Travel-Social Worker	2xx-ESSA 164-State Compensatory	2xx-32-6411-00-xxx-9-2x-xxx 164-32-6411-00-xxx-9-xx-xxx	<u>Does Not require TEA approval.</u> <i>In-State Travel for Social Workers</i> - transportation, meals, room, and other expenses associated with traveling on official school business. It includes registration fees for attending conferences, seminars, professional development.
ORG-Travel-Social Worker Out of State (OS) **	2xx-ESSA 164-State Compensatory	2xx-32-6411-OS-xxx-9-2x-xxx 164-32-6411-OS-xxx-9-xx-xxx	<u>2xx Requires requisition and TEA approval prior to payment and traveling.</u> <i>Out-of-State Travel for Social Workers</i> - transportation, meals, room, and other expenses associated with traveling on official school business. It includes registration fees for attending conferences, seminars, professional development
ORG-Student Travel- entrance fees/chartered bus (Educational Field Trips Only) **	2xx-ESSA 164-State Compensatory	2xx-11-6412-00-xxx-9-2x-xxx 164-11-6412-00-xxx-9-xx-xxx	<u>2xx Requires requisition and TEA approval prior to payment and traveling.</u> Student field trip expenditures solely for <u>entrance fees</u> and/or cost of <u>chartered buses</u> . Use 11 6412 for <u>entrance fees</u> and for <u>chartered buses</u> . Cannot take place at sporting events, or amusement/theme parks



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Resources Needed	Fund Source	Account Code	Description/Used For
ORG-Student Travel- yellow bus (Educational Field Trips Only) **	2xx-ESSA 164-State Compensatory	2xx-11-6494-00-xxx-9-2x-xxx 164-11-6494-00-xxx-9-xx-xxx	<u>2xx Requires requisition and TEA approval prior to payment and traveling.</u> Student field trip expenditures solely for transportation cost of <u>yellow buses</u> . Use 11 6494 for <u>yellow buses</u> . Cannot take place at sporting events, or amusement/theme parks
Item per unit cost of \$5000 or more**	211-Title I, Part A	211-11-6639-65-xxx-9-30-000	<u>Requires requisition and TEA approval prior to purchase.</u> Item per unit cost of \$5,000 or more (for routing technology items). Use of Funds Questionnaire Required**
Item per unit cost of \$5000 or more**	211-Title I, Part A	211-11-6639-xx-xxx-9-30-000	<u>Requires requisition and TEA approval prior to purchase.</u> Item per unit cost of \$5,000 or more. (for routing all items other than technology items). Use of Funds Questionnaire Required**

- * 2XX Requires requisition and TEA approval *prior* to order and payment
- ** If expending funds for traveling Out of State (OS) or Field Trips please complete the TEA Justification Form. A form is needed per destination prior to allocating funds.
- *** Use of Funds Questionnaire Required.

Function Numbers:

- 11** used for students/instructional
- 12** used for resource centers/Library Books
- 13** used for teacher professional development
- 21** Instructional Leadership
- 23** Principal/ (admin.)
- 31** Counselor
- 32** Social Worker
- 53** Data Processing Personnel
- 61** Parent and Family Engagement