*New Directors Orientation Companion Document Pre-Event* ***Toolkit***

**Introduction**

Welcome to the New Director Orientation Toolkit. Whether you're new or returning for a refresher, this guide gives you a focused head start. Use it to:

* Find the right program contacts
* Navigate deadlines and systems (EGMS, EDS)
* Understand key responsibilities
* Engage families and communities early

Use it to prepare before the webinar, follow along during it, and revisit it throughout the year. Print or keep it digital, whatever helps you stay organized. Let’s start strong—together.

## Programs Included

Each program supports schools in different ways. Use the next pages to save key links and contacts.

| Program | Contact (Website and Email) |
| --- | --- |
| All Programs at OSPI | * **📬 *Sign up once for*** [***Announcements***](https://public.govdelivery.com/accounts/WAOSPI/subscriber/new) **and choose the programs you want updates on.** |
| Learning Assistance Program (LAP) | * [Learning Assistance Program](https://ospi.k12.wa.us/student-success/support-programs/learning-assistance-program-lap) * Email: [lap@k12.wa.us](mailto:lap@k12.wa.us) |
| Title I, Part A (TIA) | * [Title I, Part A Website](https://www.k12.wa.us/policy-funding/grants-grant-management/title-i-part) Email: [title1a@k12.wa.us](mailto:title1a@k12.wa.us) |
| Office of Continuous Improvement (OSSI) | * [Continuous School Improvement Resources](https://ospi.k12.wa.us/student-success/support-programs/system-and-school-improvement/continuous-school-improvement-resources) * Email: [[OSSI@k12.wa.us](mailto:OSSI@k12.wa.us)](mailto:OSSI@k12.wa.us) |
| Title I, Part C (TIC) | * [Migrant Education (ospi.k12.wa.us)](https://ospi.k12.wa.us/student-success/access-opportunity-education/migrant-and-multilingual-education/migrant-education-program) * For contact information please refer to their website. |
| Title II, Part A (TIIA) | * [Improving Teacher and Principal Quality (Title II, Part A) (ospi.k12.wa.us)](https://ospi.k12.wa.us/policy-funding/grants-management/improving-teacher-and-principal-quality-title-ii-part) * Email: [Title2A@k12.wa.us](mailto:Title2A@k12.wa.us) |
| Title III | Transitions Bilingual Instructional Program (TBIP) | * [Multilingual Education Program (ospi.k12.wa.us)](https://ospi.k12.wa.us/student-success/access-opportunity-education/migrant-and-multilingual-education/multilingual-education-program) * Email: [multilingualed@k12.wa.us](mailto:multilingualed@k12.wa.us) |
| Title IV, Part A (TIVA) | * [Student Support and Academic Enrichment (Title IV, Part A) (ospi.k12.wa.us)](https://ospi.k12.wa.us/policy-funding/grants-management/student-support-and-academic-enrichment-title-iv-part) * Email: [TitleIVA@k12.wa.us](mailto:TitleIVA@k12.wa.us) |
| Title IV, Part B | REAP | RLIS (TIVB) | * [Rural Education Initiative (ospi.k12.wa.us)](https://ospi.k12.wa.us/policy-funding/grants-management/rural-education-initiative) * Email: [ellen.hopkins@k12.wa.us](mailto:ellen.hopkins@k12.wa.us) |
| Equitable Services (ES) | * [Private School Participation in Federal Programs](https://ospi.k12.wa.us/policy-funding/grants-management/every-student-succeeds-act-essa/elementary-and-secondary-education-act-esea/private-school-participation-federal-programs) * Email: [Sheila.gerrish@k12.wa.us](mailto:Sheila.gerrish@k12.wa.us) |

**Use this space to jot down any reminders, contacts, or key actions for each program as we move through the session.**

|  |  |
| --- | --- |
| **Program** | **Things I Need to Do | Remember** |
| **LAP** |  |
| **TIA** |  |
| **OSSI** |  |
| **TIIA** |  |
| **TIC** |  |
| **TIVA** |  |
| **TIVB** |  |
| **ES** |  |

**🧰** Planning Tools

This coordinated calendar was created to support LEAs with cross-program planning. It includes key timelines, reporting due dates, and program contacts. Bookmark it or add it to your favorites for easy reference throughout the year. 👉 The Coordinated Event Calendar is housed in the [*Professional Learning Opportunities for Title I, Part A and LAP*](https://ospi.k12.wa.us/policy-funding/grants-management/closing-educational-achievement-gaps-title-i-part/professional-learning-opportunities-title-i-part-and-lap)*.*

📅 Key Start-Up Highlights

This guide helps you stay on top of the most important actions in your first four months. Instead of specific dates, it highlights priority tasks and milestones across programs to keep your planning focused and reduce surprises. Print it, bookmark it, or post it at your desk as a quick reminder of what’s ahead.

| Program | August | September | October | November |
| --- | --- | --- | --- | --- |
| **Title IA** | 🔍 Review School Schoolwide/Targeted Assistance plans/protocols | 📣 Distribute Family Engagement Policies, Right-to-Know, Compacts | 📄 Complete Comparability Report | 📄 Monitor Title IA budget and activities, at a minimum monthly |
| **LAP** | 🔍 Ensure the LAP plan and budget are aligned with the Washington Integrated Student Supports Protocol. | 📄 Complete LAP Report and Acceptance of Funds in EDS | 🛠️ Collect, input, and track data for LAP services | 📊 Submit program enrollment data to CEDARS |
| **OSSI** | 🛠️ Upload SIPs and L-CAPs into Basecamp if required | 🛠️ Implement SIPs and L-CAPs; apply for OSSI Grant if eligible | 📄 Complete and submit OSSI grant application if eligible | 🛠️ Monitor Implementation of SIP(s) and L-CAP |
| **Title IIA** | 📄 Consult with all required stakeholders | 📊 Review PD plans and budgets | 🛠️ File PD agendas and sign-in sheets for program review purposes | 📄 Adjust PD offerings as needed |
| **Title III | TBIP** | 📄 Complete and submit TBIP grant application | 📣 Notify parents of TBIP/Title III services | 📣 Offer orientation in home languages | 🔍 Check language support plans |
| **Title IVA** | 🔍 Review well-rounded ed & Social Emotional Learning (SEL) plans | 🧠 Plan tech use support or SEL activities | 📊 Review Title IV budget and activities | 💬 Gather early staff feedback on SEL and enrichment |
| **Title IC** | ✅ Confirm MSIS data access | 📣 Start PAC meetings or parent events | 📣 Plan migrant family night or PAC updates | 📄 Submit migrant fall enrollment data |
| **Equitable Services** | 🤝 Consult with Private Schools (in/out of district) | 📋Review/initiate service plans for nonpublic schools | 🚚 Ensure timely delivery of services | 🗂️ Verify implementation and document service logs and communications |

🗂️ Records Organizer

**Records Retention Guidance for School Districts.**OSPI does not have the legal authority to provide retention guidance, legal advice, or compliance oversight to local governments, including school districts, under the Public Records Act or RCW 40.14. We recommend that districts consult their Agency Records Officer, Public Records Officer, or legal counsel for support. Districts may also contact Washington State Archives by emailing [recordsmanagement@sos.wa.gov](mailto:recordsmanagement@sos.wa.gov) for assistance related to records retention or management questions.

🧩Parent and Family Engagement

Effective family engagement begins with clear communication and inclusive opportunities. Here are strategies you can implement right away to build trust and ensure families are informed and involved:

**Start-of-Year Actions:**

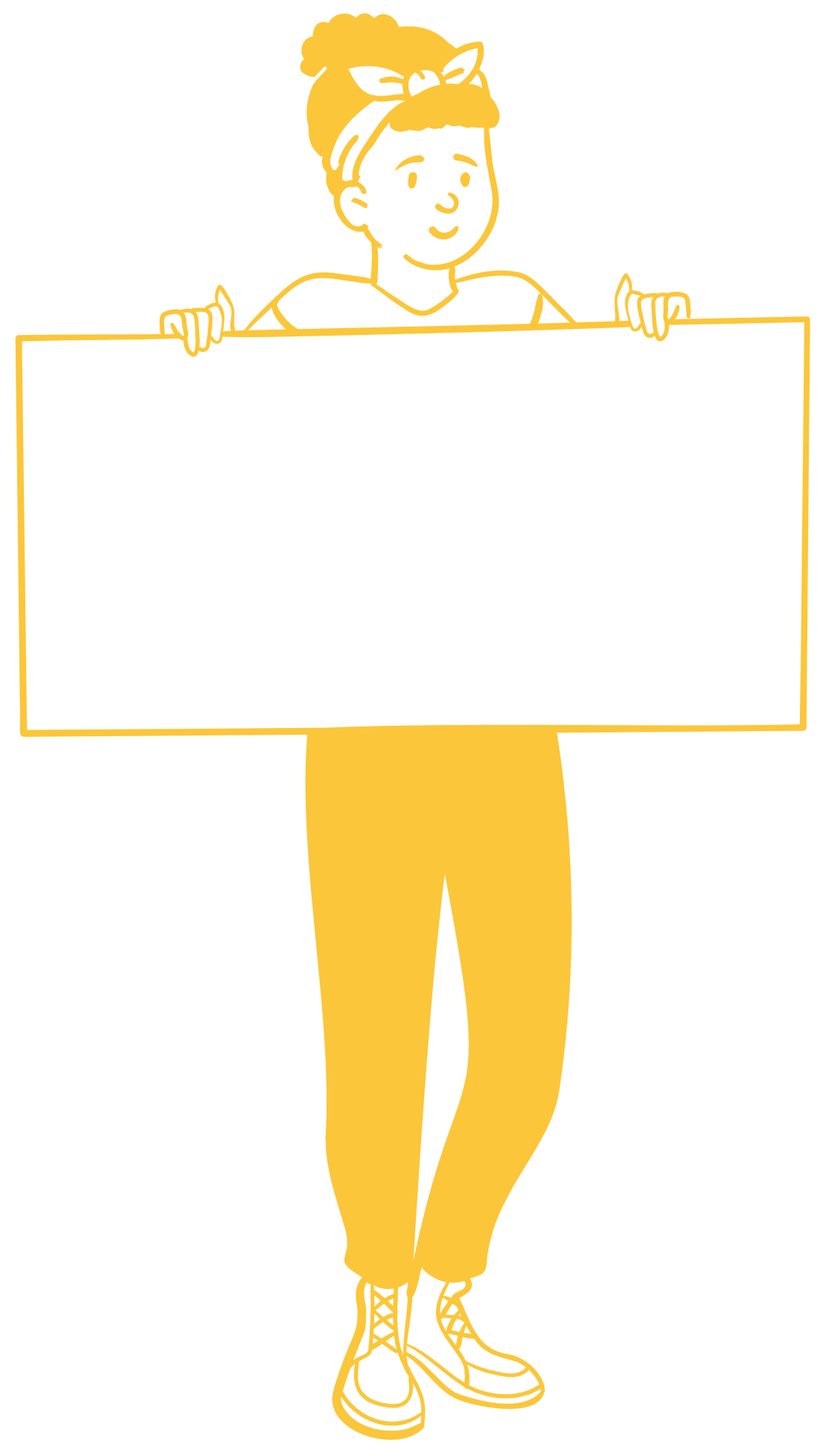
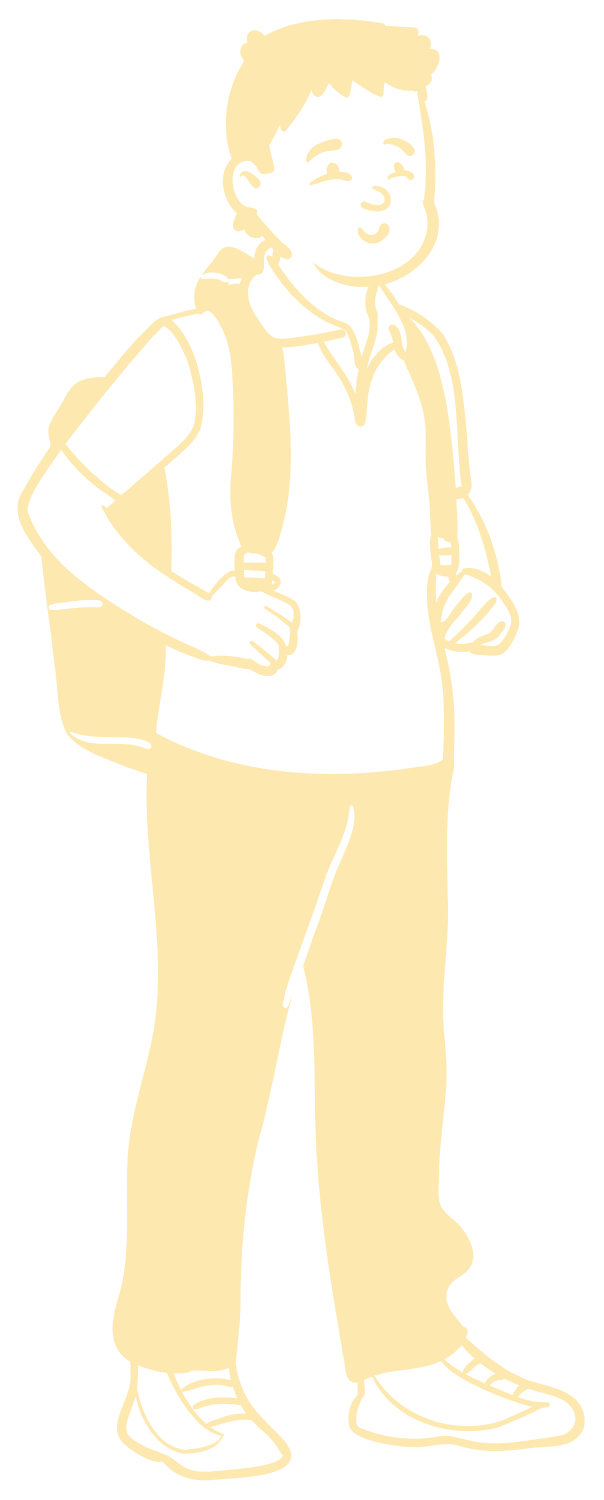
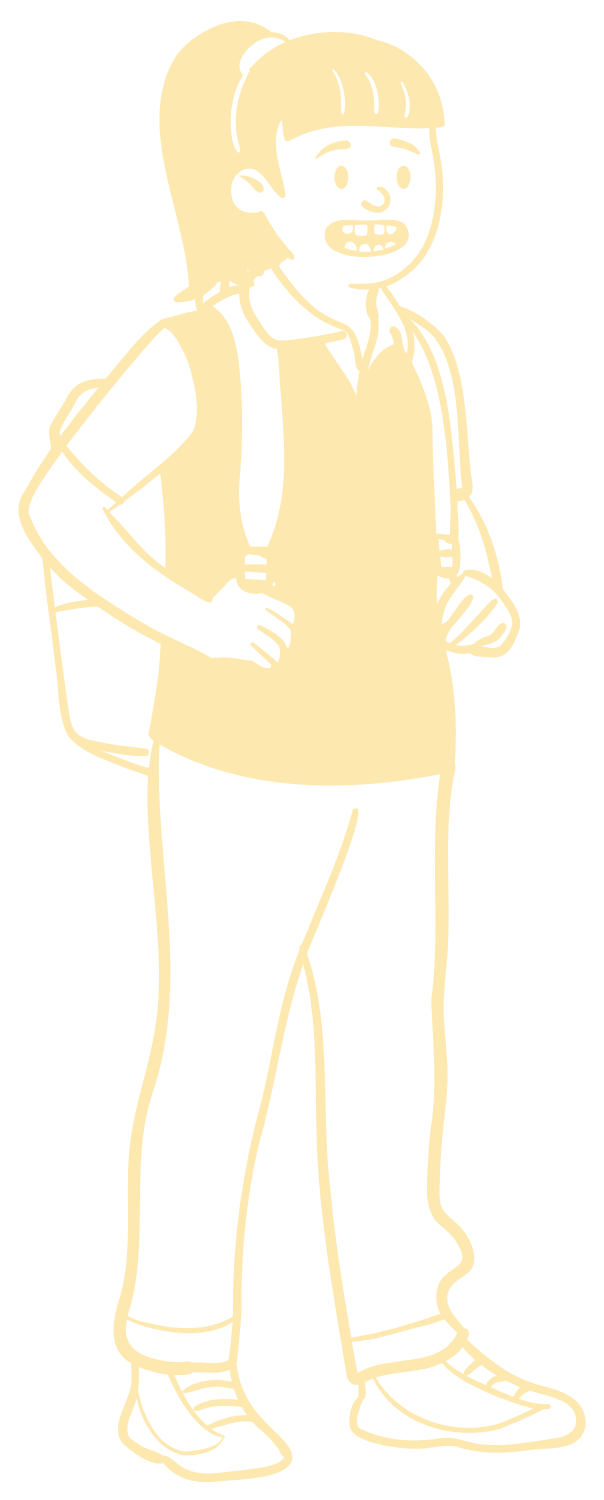
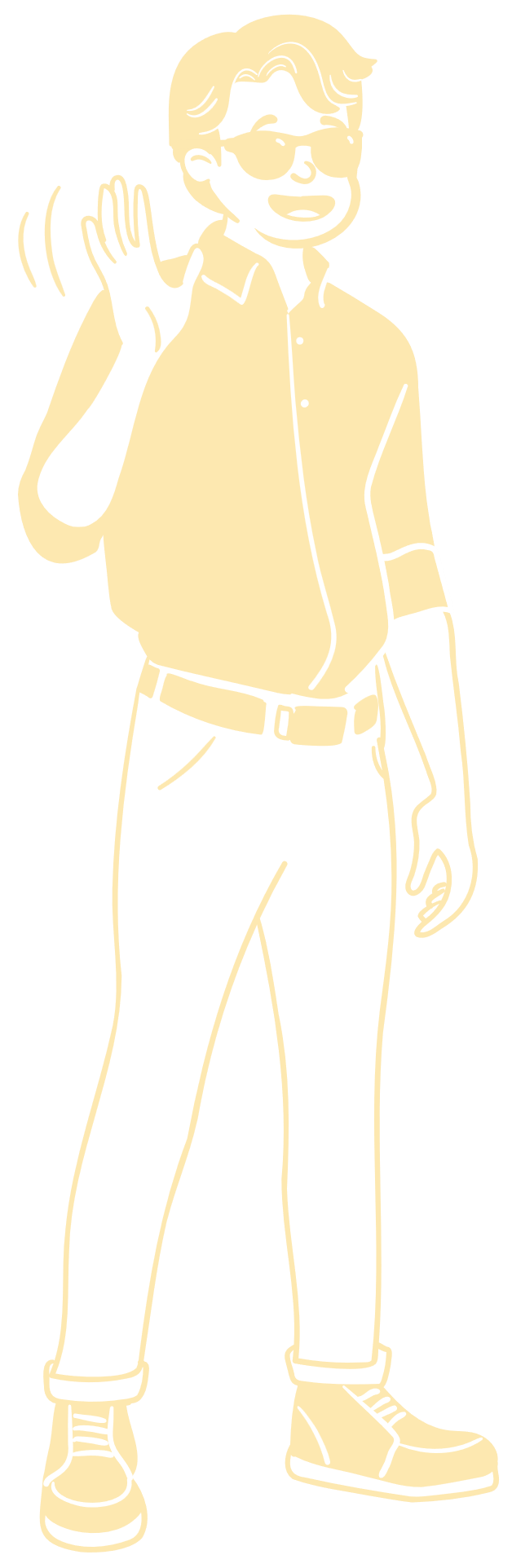
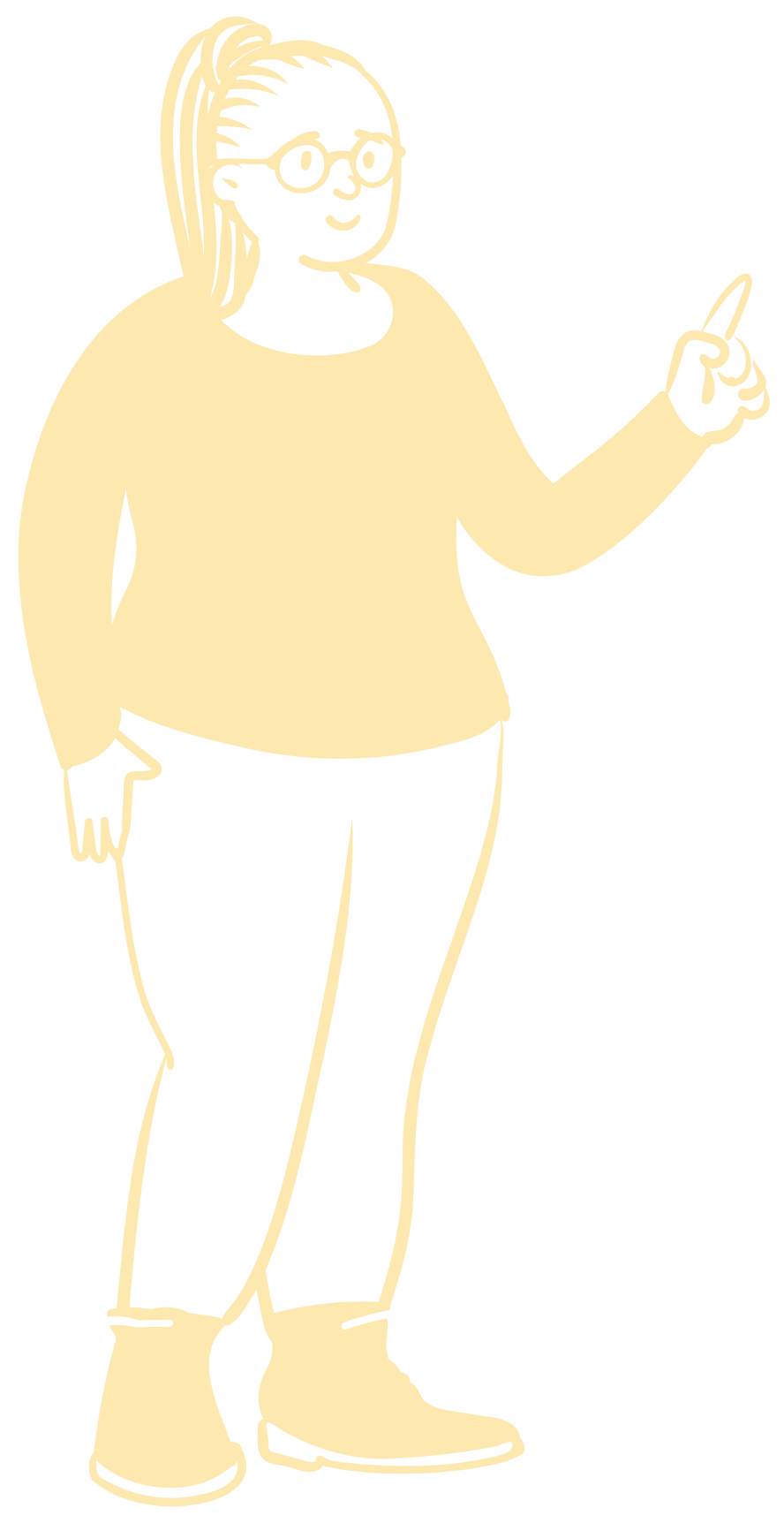
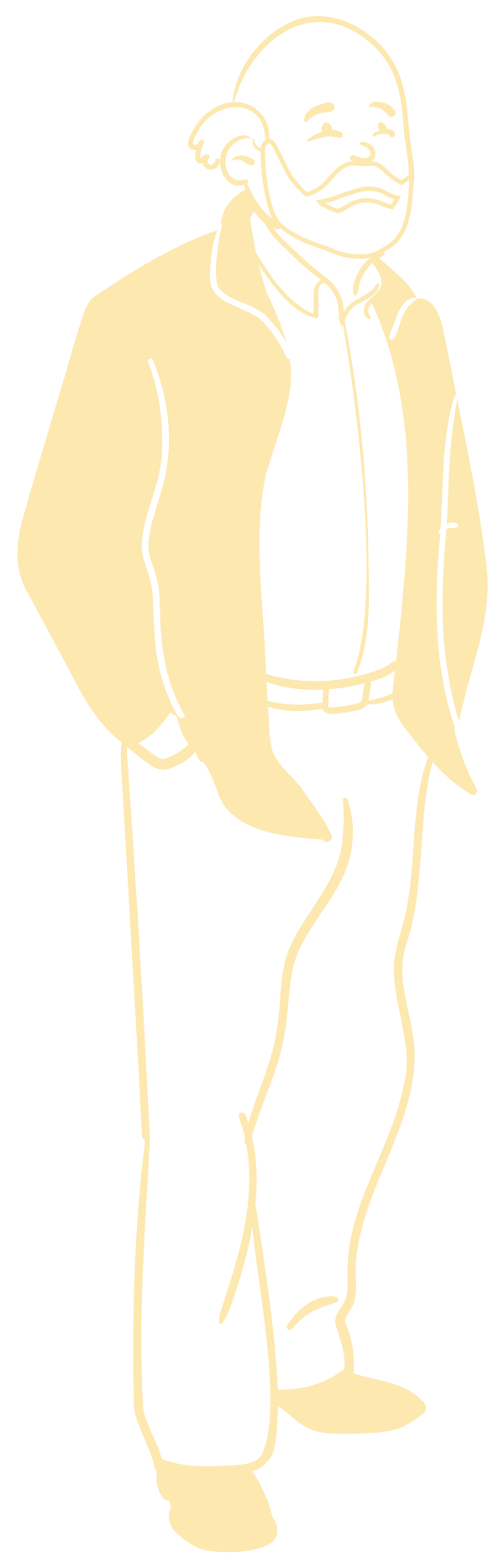
* Disseminate district and school-level family engagement policies
* Publicize dates for Title IA and School Improvement Plan (SIP) meetings that include families
* Inform families about Comprehensive Needs Assessment (CNA) and SIP participation opportunities
* Ensure that all family engagement communications are translated, and interpreters are available throughout the year for non-English speaking or families with disabilities

| Program | Item | Family Engagement Tips |
| --- | --- |
| **Title I, Part A** | Combine your Title IA annual meeting with a family night to increase attendance and assess language access needs. |
| **OSSI** | Invite parents to review SIP goals and offer feedback through short surveys or input nights. |
| **Title I, Part C** | Update your Parent Advisory Council (PAC) and create culturally relevant outreach (e.g., migrant family nights, translated flyers). |
| **Title III** | Notify families of placement in TBIP and offer orientation sessions in top home languages. |
| **Title IV** | Ensure family representation in needs assessments to support Social Emotional Learning (SEL), tech, and enrichment. |

📢 Build Capacity with the Authentic Family Engagement Modules

These foundational modules are flexible tools that align with both state and federal requirements. They help teams build meaningful and sustainable family partnerships without replacing existing mandates:

OSPI’s Authentic Family Engagement Modules help schools and districts strengthen connections with families and communities. [Learning Module Playlist](https://www.youtube.com/playlist?list=PLh0gvWB_9LuV23BgW3NM3a-ZId8eBMIIk) and [School Leader Toolkit: Authentic Family and Community Engagement to Support Continuous Improvement](https://ospi.k12.wa.us/sites/default/files/2023-10/school-leader-toolkit_final_2023.pdf).



Everyone wins when families participate!

**🖥️** EGMS and EDS Basics

Understanding how to navigate OSPI's systems is essential to starting the year strong. To access funding, submit plans, and manage program updates, you’ll use two main systems:

**Education Grant Management System (EGMS):** usedfor submitting federal applications like the CGA.

* [EGMS Office Hours](https://ospi.k12.wa.us/sites/default/files/2024-06/egmsofficehoursflyer.pdf), save this link to join weekly sessions and get live answers from OSPI staff throughout the year.
* [Consolidated Grant Application Contacts](https://ospi.k12.wa.us/policy-funding/grants-grant-management/esea-consolidated-grant-application/consolidated-grant-application-contacts), bookmark this page to quickly find the right program contact when you need help or clarification.
* [EGMS Resources & Guides](https://ospi.k12.wa.us/policy-funding/grants-management/egms-resources-guides), this page includes step-by-step instructions, user guides, and training materials for navigating EGMS. You’ll find information on logging in, managing user access, completing applications, submitting claims, and more.
* [Newsletter](https://public.govdelivery.com/accounts/WAOSPI/subscriber/new?topic_id=WAOSPI_600) Sign up here to receive EGMS announcements and updates, including new opportunities, deadlines, and important system information.

**Education Data System (EDS).** For reporting, LAP, and staff access management.

* [Login to the Education Data System](http://eds.ospi.k12.wa.us/)
* [District Data Security Manager Directory](https://eds.ospi.k12.wa.us/SecurityManagerList.aspx)
* [EDS Administration Resources](https://www.k12.wa.us/data-reporting/reporting/education-data-system-administration-eds)

Use this quick chart to understand which applications must be submitted in EGMS or EDS to secure program funds and when they are due.

| Grant System | Federal Program | Grant Name or Number | Required? | Opens | Due Date |
| --- | --- | --- | --- | --- | --- |
| Educational Grant Management System (EGMS) | Title IA, Title IC, Title II, Title III, Title IVA, Title ID | Consolidated Grant Application (CGA) | Yes | August | September |
| EGMS | Multilingual TBIP | Form Package (FP) 219 | Yes | June | August 1 |
| EGMS | School Improvement (OSSI) | Federal Form Package 910 | No  (can opt out) | Mid-May | October of each year |
| Educational Data System (EDS) | Learning Assistance Program (LAP) | LAP Report (includes Acceptance of Funds) | Yes | May | September of each year |
| EGMS | CGA  All Title Programs | Budget Amendments | No.  If Applicable | After CGA Approval | Last Budget Amendment October 15 |
| EGMS | CGA  All Title Programs | Claims | Yes | After CGA Approval. October 15 is first claim date | November 15  of each year |

## Obligate (Commit) & Track

**Work closely with your business manager** to ensure your state and federal funds are used strategically, tracked accurately, and aligned with federal and state requirements.

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| --- | --- |
| Signal outline | * Begin Spending: You may obligate and spend funds after pre-application approval. Ensure expenditures align with the approved budget and program purpose. |
| * **Track by Year:** Clearly identify which fiscal year’s funds are being used to avoid misuse or confusion, especially when multiple grant years are open. |
| * **Monitor at least Monthly:** Set up monthly check-ins with your Business Manager or fiscal staff to review budget-to-actual spending. |
| * **Plan for Claims:** Agree on who will submit claims in EGMS and when. Timely and accurate claiming prevents cash flow issues and errors. |
| * **Maintain Compliance:** Ensure expenses follow all applicable federal and state guidelines (e.g., allowability, reasonableness, allocability). |
| * **Document Decisions:** Keep clear records of budget discussions, adjustments, and spending decisions for program review or audits. |

💵 Spending Funds Wisely: Is It Allowable?

Use this section to determine if a cost is appropriate under federal guidelines. Refer to [EDGAR §200.404](https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200/subpart-E/subject-group-ECFRea20080eff2ea53/section-200.404) for more.



🏫 Equitable Services in Federal Programs (ES): Quick Start Checklist

This quick checklist offers a snapshot of key steps for managing Equitable Services in federal programs. It’s designed to help new directors ensure timely consultation, coordination, and compliance when private schools participate.

**📝** Your Reflections

**What are your next steps after the session?**

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|  |

**What’s one thing you’re still unsure about or want to ask your team or OSPI contact?**

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| --- |
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|  |

**Who are the key contacts you'll reach out to for help or clarification?**

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| --- |
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|  |
|  |

**You’ve got this. Let’s build a great year, one step at a time.**

Bring this with you to the session or keep it open as a reference guide. You’ll get more from the slides and discussions without needing to take notes on everything.

## Acronym Reference Guide

This list includes some of the most common acronyms you’ll see in the New Director Orientation materials. Not all acronyms are listed here—there are many you’ll encounter as you work with various federal and state programs. As you connect with program staff, participate in meetings, and review guidance, you’ll become more familiar with the terminology and acronyms used in your daily work.

| Acronym | Definition |
| --- | --- |
| **CGA** | Consolidated Grant Application – Single application in EGMS to access multiple federal programs (Title I, II, III, IV, etc.). |
| **CNA** | Comprehensive Needs Assessment – Process to identify strengths, needs, and priorities for planning and improvement. |
| **EDS** | Education Data System – OSPI platform for reporting, program submissions, and managing staff access. |
| **EGMS** | Education Grant Management System – OSPI platform for submitting/managing federal grant applications, budgets, and claims. |
| **ES** | Equitable Services – Federal program services for eligible students/teachers in participating private schools. |
| **LAP** | Learning Assistance Program – WA state-funded program for supplemental services to K–12 students not meeting standards. |
| **LEA** | Local Education Agency – Public board or authority operating public schools (e.g., school districts). |
| **MSIS** | Migrant Student Information System – National database tracking migrant student educational and health data. |
| **PAC** | Parent Advisory Council – Group advising on programs and services, especially in Migrant Education (Title IC). |
| **PD** | Professional Development – Training for educators to improve instruction and student outcomes. |
| **SEL** | Social and Emotional Learning – Instruction developing self-awareness, management, social skills, and decision-making. |
| **SIP** | School Improvement Plan – School team’s plan for goals, strategies, and actions to improve performance. |
| **SWP** | Schoolwide Program – Title I model upgrading the entire educational program of a school. |
| **TAS** | Targeted Assistance School – Title IA model providing supplemental services to identified students most in need. |
| **TBIP** | Transitional Bilingual Instructional Program – WA program supporting English language development for multilingual learners. |
| **TIA** | Title I, Part A – Federal program funding schools serving low-income students. |
| **TIC** | Title I, Part C – Migrant Education program providing supplemental services to migrant children. |
| **TIIA** | Title II, Part A – Federal program supporting effective instruction through teacher and leader development. |
| **TIVA** | Title IV, Part A – Student Support and Academic Enrichment Grants for well-rounded education and safe, healthy schools. |
| **TIVB** | Title IV, Part B – REAP/RLIS program helping rural school districts to meet academic standards. |