

New Directors Orientation Companion Document Pre-Event Toolkit

Introduction

Welcome to the New Director Orientation Toolkit. Whether you are 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 online seminar, follow along during it, and revisit it throughout the year. Print or keep it digital, whatever helps you stay organized. Let us 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)
Learning Assistance Program (LAP)	• Learning Assistance Program • Email: lap@k12.wa.us
Title I, Part A (TIA)	• Title I, Part A • Email: title1a@k12.wa.us
School Improvement (SI)	• School Improvement Resources • Email: OSSSI@k12.wa.us
Title I, Part C (TIC)	• Migrant Education (ospi.k12.wa.us) • 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) • Email: Title2A@k12.wa.us
Title III Transitions Bilingual Instructional Program (TBIP)	• Multilingual Education Program (ospi.k12.wa.us) • Email: multilingualed@k12.wa.us
Title IV, Part A (TIVA)	• Student Support and Academic Enrichment (Title IV, Part A) (ospi.k12.wa.us) • Email: TitleIVA@k12.wa.us
Title V, Part B REAP RLIS (TVB)	• Rural Education Initiative (ospi.k12.wa.us) • Email: title1a@k12.wa.us
Equitable Services (ES)	• Private School Participation in Federal Programs • Email: Sheila.gerrish@k12.wa.us
All Programs at OSPI	•  Sign up once for Announcements and choose the programs you want updates on.



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	
School Improvement	
TIIA	
TIC	
TIVA	
TVB	
ES	

Planning Tools

This coordinated calendar supports LEAs with cross-program planning by outlining 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 available in the [Professional Learning Opportunities for State and Supplemental Programs](#).

Key Start-Up Highlights

This guide helps you stay on top of the most important actions in your first four months.

Program	August	September	October	November
Title IA	 Review School Schoolwide/Targeted Assistance plans/protocols	 Distribute Family Engagement Policies, Right-to-Know, Parent Notification, School-Parent Compacts	 Complete Comparability Report	 Monitor Title IA budget and activities, at a minimum monthly
LAP	 Confirm WISSP-based plan for student supports	 Complete LAP Report and Funds and Assurances in EDS	 Document and monitor implementation of the WISSP-based plan	 Submit data to CEDARS as available
School Improvement	 Upload SIPs and L-CAPs into Basecamp if required	 Implement SIPs and L-CAPs; apply for School Improvement Grant if eligible	 Complete and submit grant application if eligible	 Monitor Implementation of SIP(s) and L-CAP
Title IIA	 Consult with all required stakeholders	 Review PD plans and budgets	 Monitor implementation of PD strategies	 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: to clarify services to be implemented, monitoring, and evaluation plans for the upcoming year	 Review/initiate service plans for nonpublic schools	 Ensure timely delivery of services	 Verify implementation and document service logs and communications

Rural Education (Title V, Part B) Important Dates

August:  Complete your CGA Rural Education Application.

September–November:  Monitor implementation and expenditures.

January–February	March	April	May
 Review the Master Eligibility Spreadsheet (MES) once the U.S. Department of Education (ED) releases it.  Attend the ED REAP LEA training for the FY 2027 SRSA grant.	 Look for the Small, Rural School Achievement Program (SRSA) application announcement and timeline.	 Complete the SRSA application if the application window is open.	 Continue monitoring application deadlines and OSPI communications if the window extends into May.

Note: The U.S. Department of Education sets rural Education Assistance Program (REAP) timelines annually. Updated dates and guidance are typically shared after the State Educational Agency Quarterly Meeting in December. For the most current timeline, refer to ED and OSPI communications and the OSPI Rural Education webpage.

Parent and Family Engagement

Effective family engagement is a shared responsibility across many federal programs. Although each program has unique requirements, many family engagement activities can be coordinated to create meaningful partnerships with families while reducing duplication for staff and schools.

The table below highlights common Parent and Family Engagement priorities during the first three months of the school year. Use it as a planning tool alongside your district's family engagement calendar to coordinate activities, identify key requirements, and adapt timelines to meet local needs.

Family-Centered Approach

Design engagement activities around the needs of families, not programs. When families have meaningful opportunities to participate, multiple program goals can often be achieved through a single experience.

Parent & Family Engagement Across Federal Programs

Program	September	October	November
Title I, Part A	Hold the Annual Title I, Part A Meeting. Distribute the LEA and School PFE Policies, School–Parent Compact and required parent notifications.	Build family capacity through communication, academic support, and engagement activities.	Continue two-way communication and monitor implementation of PFE activities with school(s).

Program	September	October	November
School Improvement (Title I, 1003)	Share school improvement priorities and invite families to participate in planning and implementation.	Gather family input through meetings, surveys, or other engagement opportunities.	Review feedback and communicate progress toward improvement goals.
Title II, Part A	Ensure families and other stakeholders have informed professional learning priorities through meaningful consultation.	Communicate how educator learning supports improved student outcomes and family partnerships.	Review stakeholder feedback to inform future professional learning.
Title III / TBIP	Notify families of multilingual learner identification, services, and parent rights in a language they understand.	Provide families with resources to support language development and academic success at home.	Continue family engagement activities and gather feedback on communication and services.
Title I, Part C (Migrant)	Convene or begin Parent Advisory Council (PAC) meetings and communicate available services.	Engage migrant families in identifying needs and participating in program activities.	Review parent feedback and continue communication about available services and supports.
Title IV, Part A	Ensure parents and community members were included in stakeholder consultation and understand available student supports.	Communicate opportunities related to well-rounded education, safe and healthy schools, and educational technology.	Gather stakeholder feedback to strengthen implementation.
Learning Assistance Program (LAP)	Communicate available student supports and opportunities to partner in learning with families.	Maintain regular communication about student progress.	Review student progress with families and adjusted plan for support as needed.
Title V, Part B (Rural)	Communicate how Rural Education funds support local priorities and student needs, when appropriate.	Encourage family and community partnerships that support local implementation.	Continue communication and gather feedback from families and community partners.

Program	September	October	November
Equitable Services	Collaborate with participating private schools to ensure eligible families understand available services and how to access them.	Maintain ongoing communication with private school officials and participating families regarding services and implementation.	Gather feedback from participating private schools and families, as appropriate, and document communication and consultation activities.

Fall Parent Notifications

This table highlights the common parent notifications and communication resources that are typically needed at the beginning of the school year. This is a planning tool—not a comprehensive compliance checklist. Refer to each program's guidance to ensure all required parent notifications, consultations, advisory responsibilities, and timelines are met.

Identified parent notification need	Optional resource
☐ Review required Title I, Part A notices and responsibilities	The list of Parent Notification Requirements for LEAs and Schools (look for Appendix A, page 20)
☐ Provide families with an overview of Title I, Part A	Parent Guides in Multiple Languages
☐ Share key Title I, Part A information in family-friendly formats	Title I, Part A Notification Newsletter Template: English Chinese Khmer Korean Punjabi Russian Somali Spanish Tagalog Vietnamese
☐ Inform families about staff-qualification rights	Parents' Right to Know— Teacher and Paraeducator Qualification Templates
☐ If applicable, provide required notice regarding certification or licensure	Parents' Right to Know— Timely Notice of Limited State Certification and Licensure Templates
☐ Inform families about the federal citizen complaint process	OSPI Federal Citizen Complaint Process (the newsletter template above includes this website link)
☐ Family Notifications for TBIP/Title III: Provide required notification of placement or continued eligibility for English Language Development Services.	TBIP/Title III Notification Timeline and the Multilingual Family communication Templates
☐ (Optional) Help families understand the local process for raising concerns or filing complaints	LEA school board policies and procedures, including the local chain of command, responsible contacts, timelines, and appeal or escalation steps

Resource Hubs to Explore

You do not need to implement every strategy or use every resource at once. The following resource hubs provide practical tools, templates, professional learning, and examples to help strengthen family engagement, build staff capacity, and support continuous improvement throughout the school year.

- [Whole Child Initiative](#) – Family engagement modules and implementation strategies that support school improvement, integrated supports, and community partnerships.
- [Washington Statewide Family Engagement Center \(WSFEC\)](#) – Toolkits, self-assessments, communication resources, and family engagement strategies.
- [School Leader Toolkit](#) – Practical tools such as the 360 Communication Strategy to strengthen school-family partnerships.
- [Community Partnerships and Integrated Supports](#) – Resources that connect families, schools, and community organizations to support student success.

Program-Specific Requirements: The resources in this section are intended to strengthen family engagement across federal and state programs. LEAs should refer to each program's guidance to ensure all required parent and family engagement, consultation, notification, and advisory responsibilities are met. **Note:** For Title I, Part C (Migrant Education), these resources do not replace required Migrant Parent Advisory Council (PAC) responsibilities or other program-specific family engagement requirements.

New Director Reminder

Start with what you already have. Review your district's existing family engagement calendar before planning new activities. Many existing events can support multiple programs with intentional planning.

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 for assistance related to records retention or management questions.

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 will use two main systems:

Education Grant Management System (EGMS): used for submitting federal applications like the CGA.

- [EGMS Office Hours](#), save this link to join weekly sessions and get live answers from OSPI staff throughout the year.
- [Consolidated Grant Application Contacts](#), bookmark this page to quickly find the right program contact when you need help or clarification.

- [EGMS Resources & Guides](#), this page includes step-by-step instructions, user guides, and training materials for navigating EGMS. You will find information on logging in, managing user access, completing applications, submitting claims, and more.
- [Newsletter](#) 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.

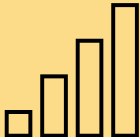
- [Login to the Education Data System](#)
- [District Data Security Manager Directory](#)

Use this quick chart to understand which applications must be submitted and due in EGMS or EDS.

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, RLIS	Consolidated Grant Application (CGA)	Yes	August	September
EGMS	Multilingual TBIP	Form Package (FP) 219	Yes	June	August 1
EGMS	School Improvement (SI)	Federal Form Package 910	No (can opt out)	Mid-May	October 31 each year
Educational Data System (EDS)	Learning Assistance Program (LAP)	LAP Report (includes Acceptance of Funds)	Yes	May	September of each year
EDS	Equitable Services	Private Participation in Federal Programs	Yes (Notice must be given to private schools)	Mid-March	Mid-April
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.

	☐ 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 §200.403](#) for more information.

Before You Spend: A Quick Reasonableness Check

Ask Yourself	Quick Check
1. Is it necessary and reasonable for the program?	☐ Would another district spend this amount for the same purpose?
2. Does it follow the rules?	☐ Check federal, state, district, procurement, and program requirements.
3. Is the price reasonable?	☐ Compare vendors, contracts, or local market rates and document the comparison.
4. Can you justify the purchase?	☐ Could you clearly explain the cost and program benefit to a parent, auditor, or the public?
5. Did you follow district procedures?	☐ Complete required approvals and keep the supporting documentation.

When in doubt: Pause before purchasing. Check the program requirements and consult your business office or program contact.

Equitable Services in Federal Programs (ES): Things to Remember

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

Remember	What to Do	Why It Matters
 Start Consultation Early	After Private Participation in Federal Programs application closes in EDS, begin consultation process to make program decisions. For Title IA, include out-of-district private schools.	Builds meaningful partnerships and ensures all eligible schools have an opportunity to participate.
 Know Student & School Needs	For Title IA, identify eligible students and discuss academic needs during consultation, based upon data.	Services should be based on student needs—not predetermined programs or purchases.
 Plan Before You Purchase	Develop service plans and select providers collaboratively with participating private schools.	Federal law requires timely and meaningful consultation before services are determined.
 Provide Equitable Services	Begin services, monitor implementation, and evaluate impact of services throughout the school year.	Helps ensure eligible private school students receive equitable access to services.
 Keep Good Documentation	Maintain consultation records, service plans, service logs, and supporting documentation in EDS (and your own files).	Good documentation demonstrates compliance and supports continuous program improvement.

Common Pitfalls:

Forgetting to alert private schools that the Application to participate in federal programs is open in EDS, and offering to help.

Making any decisions regarding equitable services without consulting private school officials.

Forgetting to consult with Out-of-District private schools for Title IA and Title IVB.

Failing to communicate often throughout the school year to monitor, and adjust services if needed.

Failing to evaluate equitable services provided for all federal programs.

Your Reflections

What are your next steps after the session?

What is one thing you are still unsure about or want to ask your team or OSPI contact?

Who are the key contacts you will reach out to for help or clarification?

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 highlights common acronyms used in the New Director Orientation materials. It is not exhaustive; you will encounter additional acronyms as you work with federal and state programs. Over time, as you connect with program staff, attend meetings, and review guidance, these terms will become more familiar 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 TK–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.

Acronym	Definition
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.