

Equitable Services

NCFEPA - Greensboro

October 2025

Talbot Troy

Information Management, Protocols and
Communication Tools (IMPACT)

Office of Federal Programs

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Who will win the World Series?



Agenda

- **Where We Are (Calendar-wise)**
5 minutes
- **Case Studies from Over the Years**
10 minutes to read and discuss in small groups
15 minutes for full-group discussion
- **Other Cases Shared by Participants**
15 minutes
- **Q & A**
5 minutes
- **Resources**

Equitable Services Annual Timeline



♦ check updated directory

♦ send invitations

♦ hold initial consultations
♦ count students for prop share calc

♦ finalize affirmation forms

♦ calculate prop shares

♦ begin to ID students eligible for services?
♦ create initial plans for services

start of summer vacation for private schools

ready for consolidated application



Equitable Services Annual Timeline



July

Aug

Sept

Oct

Nov

Dec

- ◆ implement, monitor and adjust as needed
- ◆ identify new students eligible for services, as needed

◆ send reminders about schedules and deadlines prior to holidays

Equitable Services Annual Timeline



♦ check updated directory

♦ send invitations

← The cycle starts again...

- ♦ implement, monitor and adjust as needed
- ♦ identify new students eligible for services, as needed

Cases Studies

For the following scenarios, consider what issues are at play. How would you handle the situation as a district administrator? What advise do you believe the state Ombud will offer?

After reading through these in groups or individually, we will reconvene to discuss.

Case 1

What Happened?

In early October, Principal Ken Griffey of Green Grass Private Academy, calls the state equitable services ombud to ask how they can participate in Title I services for the current school year. The ombud asks if Mr. Griffey was invited to consult with his local district back in the spring, and Mr. Griffey says he was not.

The Ombud finds that an Affirmation for Green Grass is included in the district's CCIP uploads with Section D checked indicating that the school was invited but did not consult. In addition, the Directory of private schools lists a different person, Ms. Chris Evert, as the lead contact.

In February, the district had sent the invitation to Ms. Evert and got no response. However, Mr. Griffey explained that Ms. Evert had left the school in January.

Case 2

What Happened?

When reviewing the consolidated application for Grand Slam Public Schools, DPI Program Administrator Tilly Trident found the following discrepancy:

Title I Set-asides, Line 2B, Current Year Proportionate Share = \$9,036

Current Year PRC 050 Proportionate Share Amount Budgeted = \$0

Ms. Trident asked Grand Slam administrator Cal Raleigh why the prop share funds were not included in the budget. Mr. Raleigh said the funds are all there, identifiable by the two-digit local code 88.

Case 3

What Happened?

Ace Public Schools finance officer Randy Johnson suggests applying the unrestricted indirect admin cost rate to equitable services expenditures while the restricted rate is applied to the spending for district schools. His reasoning is that the implementation of equitable services is disproportionately burdensome on administrative tasks, as compared to other services. Federal program director Ichiro Suzuki asked the DPI program administrator Venus Williams if this was OK.

Case 4

What Happened?

Diamond City School District will use Title IV-A funds to purchase science equipment to supplement the existing science lab at Home Plate Academy. The school's principal Jay Buhner has identified the desired materials and their costs in the catalogue of their preferred vendor and has shared that information with the district's federal program director Kay Yow. Ms. Yow places the order and requests that the materials are shipped to the private school's main office so that the delivery is guaranteed to take place on a school day. The private school office staff can track the shipment and will be there to sign for it when it arrives.

Any red flags?

Case 5

What Happened?

Principal Lou Piniella of Moose Private School has provided the info needed for Title I prop share calculations but would like to withhold the names of Title I eligible students to protect their privacy.

It is mid June and the district's federal program director Katie Ledecy and the district-hired interventionist need to put together preliminary plans for the start of next school year.

Case 6

What Happened?

Field of Dreams Academy is participating in equitable services provided by Fair Territory School District. A few weeks later, the school principal forwards an invoice for unpaid registration fees for an upcoming Title II-allowable PD activity for teachers at the school, along with the agenda and other details. Federal program director Julio Rodriguez reviews the materials and believes that the activity is allowable and will address the needs identified in consultation.

But Julio does have some concerns...

Questions, Thoughts, Ideas

- [DPI Equitable Services web page](#)
 - Series of FPMS memos
 - Other Resources from FPMS and USED
- Weekly FPMS Update (email)
- Contact me at any time!
 - Talbot.Troy@dpi.nc.gov
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