



LEA:	DATE SUBMITTED:	BY:
OPI REVIEWER: PAIGE SEDAHL	DATE:	FINDINGS:

**Montana Office of Public Instruction- Title IVA Monitoring Tool**

**REQUIRED MONITORING DOCUMENTS FOR TITLE IV-A VARY BASED ON ALLOCATION AMOUNT AND PROGRAM ELEMENTS**

**Title IV-A Student Support and Academic Enrichment**

1. If all of your Title IV-A funds were transferred to another program: *Title I-A (Targeted or Schoolwide) or Title II-A*, you are only required to complete the Comprehensive Needs Assessment item if your allocation was over \$30,000.
2. If any funds were used for Title IV-A purposes, only complete the Programmatic and Fiscal Reporting items that apply to your school/district.

Item #	Item	Supporting Documentation	Comments
<b>Comprehensive Needs Assessment</b>			
IVA-CNA	<p><b>Sec. 4106 (d) Comprehensive Needs Assessment</b>  <b>E-grants Description:</b> Per statute 4106 (d), if your district received more than \$30,000 in funding, describe the Needs Assessment process for Title IV-A. Include an overview of which stakeholders attended the discussion, when it was conducted, what data the team used to inform decisions, and what the results of the assessment were.([count] of 2000 maximum characters used)  <b>*REQUIRED FOR ALL DISTRICTS WHO RECEIVE AN ALLOCATION OVER \$30,000.</b></p>	<p>Please provide at least one of the following:</p> <ol style="list-style-type: none"> <li><a href="#">US Dept of Education Title IV-A Needs Assessment Tool</a></li> <li>Montana Comprehensive Needs Assessment Summary Report</li> <li>Locally determined Needs Assessment Tool or Process</li> <li>Other supporting documents for comprehensive needs assessment process: Meeting agenda/minutes, supporting data or evidence, parent survey, etc.</li> </ol>	
<b>Districts Running a Title IV-A Program</b>			
<b>Programmatic Reporting</b>			
IVA-1	<p><b>Sec. 4106 (e)(1)(E) and (e)(2)(F) Annual Programmatic and Fiscal Reporting</b></p> <p><b>End of the Year Reporting and Title IV-A Final Expenditure Report or Program Report</b> (Both in E-grants)</p> <p><b>**REQUIRED FOR ALL DISTRICTS WHO RAN A TITLE IV-A PROGRAM</b></p>	<p>On the online form, check the box to confirm you have completed the following:</p> <p><b>End of the Year Reporting-</b> Completed in ESEA Consolidated Application</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Describe the programs and activities conducted with these funds in the previous school year.</li> <li><input type="checkbox"/> What measures were in place to evaluate the effectiveness of the Title IV-A programs?</li> <li><input type="checkbox"/> Describe the overall effectiveness of the programs and activities implemented in the previous school year. Include information on how the district can continue to improve the programs and activities under this program in the future.</li> </ul> <p><b>Title IV-A Final Expenditure Report or Program Report (Expenditures)-</b> Completed in E-grants</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Annually report to the State how funds are being used in the areas of Well-Rounded Education, Safe and Healthy Students, and Effective Use of Technology.</li> </ul>	



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IVA-2	<p><b>Sec. 4106 (c) Evidence of Consultation</b> Stakeholders were consulted in the development and implementation of the district's Title IV-A plan and periodic meetings are scheduled.</p> <p><b>**REQUIRED FOR ALL DISTRICTS WHO RAN A TITLE IV-A PROGRAM</b></p>	<p>Upload documentation of continued consultation with stakeholder groups, including teachers, principals, other school leaders, specialized instructional support personnel, parents, community partners, Indian tribes or tribal organizations, and local government representatives. This documentation could be sign-in sheets, stakeholder meeting minutes, parent communications, surveys/feedback (forms, emails, letters, etc.), future meetings schedule.</p>	
IVA-3	<p><b>Sec. 4106 (e)(1)(A), 4107(a)(1), 4107(a)(2), 4108 (a)(1), 4108(a)(3), 4108(a)(4) Program Coordination and Partnerships</b> Activities under Title IV-A are <b>coordinated</b> with other schools and community-based services and programs and <b>may be conducted</b> in partnership with an institution of higher education, business, nonprofit organization, community-based organization, or other public or private entity with a demonstrated record of success in implementing activities. Parental involvement is emphasized under Safe and Healthy Students.</p> <p><b>**REQUIRED FOR ALL DISTRICTS WHO RAN A TITLE IV-A PROGRAM</b></p>	<p>Examples of documentation:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Description of coordination between school and/or community services and programs.</li> <li><input type="checkbox"/> Documentation of work with community partners.</li> <li><input type="checkbox"/> Description of how your programs and activities to support Safe and Healthy students promote the involvement of parents.</li> </ul>	
IVA-4	<p><b>Sec. 4001 (a)(1) Mental Health Documents (if applicable)</b> Do you use Title IV funds to provide mental-health services or assessments? If so, describe the assessments or services provided. How are parents notified and how are permissions gathered?</p>	<p><u>Required</u> documentation if providing mental health services or assessments:</p> <ul style="list-style-type: none"> <li>• Mental health services program and assessment details.</li> <li>• Written notice for parents describing mental-health services or assessments and informed written consent documents for students who received mental-health assessments or services.</li> </ul>	



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IVA-5	<p><b>Private School Participation (if applicable) in Title IV-A Programs</b></p> <p>Describe the private school consultation process. How are equitable services plans developed? What services are being provided?</p>	<p>Documentation of Equitable Services for Title IV-A:</p> <ul style="list-style-type: none"> <li>● Documentation of private school stakeholder input and consultation in a timely manner.</li> <li>● Private schools' Title IV-A Service plan</li> <li>● Private school program evaluation for previous school year.</li> <li>● Documentation of Private school complaint procedure and any related communications.</li> <li>● Any additional fiscal documentation not included under Fiscal Requirement #6f Private School Expenditure (below).</li> </ul>	
<b>Fiscal Reporting</b>			
IVA-6	<p><b>Program Expenditures (Allocations under \$30,000)</b></p> <p><b>**REQUIRED FOR ALL DISTRICTS WHO RAN A TITLE IV-A PROGRAM</b></p>	<p><b><u>LEAs receiving LESS than \$30,000:</u></b></p> <p><b>Upload documentation that verifies the following:</b></p> <ol style="list-style-type: none"> <li>a. Expenditures are being maintained by the LEA for Title IV-A.</li> <li>b. Expenditures are for allowable and approved activities.</li> <li>c. Expenditures supplement and do not supplant state and local funds.</li> <li>d. Documentation that shows program expenses tracked by expenditure category.</li> <li>e. Documentation that shows the breakdown of expenses for the Effective Use of Technology (4109) to ensure not more than 15% was spent on devices, equipment, software, or technology infrastructure.</li> <li>f. Evidence of equitable services expenditure for private school share (if applicable).</li> </ol>	
IVA-6	<p><b>Program Expenditures (Allocations \$30,000 or more)</b></p> <p><b>**REQUIRED FOR ALL DISTRICTS WHO RAN A TITLE IV-A PROGRAM</b></p>	<p><b><u>LEAs receiving \$30,000 or GREATER:</u></b></p> <p><b>Upload documentation that verifies the following:</b></p> <ol style="list-style-type: none"> <li>a. Expenditures are being maintained by the LEA for Title IV-A.</li> <li>b. Expenditures are for allowable and approved activities.</li> <li>c. Expenditures supplement and do not supplant state and local funds.</li> <li>d. Documentation that shows program expenses tracked by expenditure category:</li> </ol>	



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		<ul style="list-style-type: none"> <li>● Breakdown indicates not less than 20 percent of SSAE funds received was used for Well-Rounded Education programs and activities (4107).</li> <li>● Breakdown indicates LEA used not less than 20 percent of SSAE funds received for Safe &amp; Healthy Students programs and activities (4108).</li> <li>● Breakdown indicates LEA used not less than 1 percent of SSAE funds received for Effective Use of Technology programs and activities (4109).</li> </ul> <p>e. Documentation that shows the breakdown of expenses for the Effective Use of Technology (4109) to ensure not more than 15% was spent on devices, equipment, software, or technology infrastructure.</p> <p>f. Evidence of equitable services expenditure for private school share (if applicable).</p>	
IVA-7	<p><b>Distribution of Funds, Sec. 4106 (e)(2)(A)</b></p> <p><b>**REQUIRED FOR ALL DISTRICTS WHO RAN A TITLE IV-A PROGRAM</b></p>	<p><b>Upload documentation or a written summary to address:</b></p> <ul style="list-style-type: none"> <li>● Are Title IV-A programs offered district-wide or provided to specific schools?</li> <li>● If programs were provided only to specific schools, what criteria was used to determine <b>which schools will receive the funds</b>?</li> <li>● How are the funds being used for schools identified for comprehensive and targeted support?</li> <li>● If doing a multi-district transfer/combined application, how do you ensure each LEA represented by the application receives their share of Title IV-A funds?</li> </ul>	
IVA-8	<p><b>Title IV-A Equipment Inventory and Labeling</b> LEA has a current inventory of any materials purchased with Title IV-A funds.</p> <p><b>**REQUIRED FOR ALL DISTRICTS WHO RAN A TITLE IV-A PROGRAM IF 600-SUPPLIES or 700-Property and Equipment was purchased.</b></p>	<p><b>Upload the following documentation:</b></p> <ul style="list-style-type: none"> <li>● LEA fixed assets inventory. This includes laptops, computers, Smartboards, projectors, etc.</li> <li>● LEA retains control of and includes an inventory of fixed assets for all equipment purchased with funds for private schools (if applicable).</li> </ul>	



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IVA-9	<p><b>Documentation of Title IV-A Employee Time</b>            What are your procedures for time documentation for employees paid with Title IV-A funds? Charges to Federal awards for salaries and wages must be based on records that accurately reflect the work performed. If employee paid with federal funds, then must show that the employee worked on that specific federal program cost objective 200.403(a)  <b>**REQUIRED FOR ALL DISTRICTS WHO RAN A TITLE IV-A PROGRAM IF Salaries/Benefits were expended.</b></p>	<p><b>Upload the following documentation:</b></p> <ul style="list-style-type: none"> <li>● Employee time records: timesheets, job description, board minutes approving position.</li> <li>● Services provided to private school children were provided by employees of the LEA or under contract with the LEA (if applicable)</li> </ul>	
IVA-10	<p><b>Internet Safety Policy and Informed Consent Form, Sec. 4121(a) and 4121(b)(2)A</b></p> <p><b>**Required for all districts that use Title IV-A funds to purchase devices or other direct costs associated with accessing the internet.</b></p>	<ul style="list-style-type: none"> <li>● Copy of School District Internet Safety Policy that includes technology protection measures for any computers with internet access that protects students from visual depictions that are obscene, child pornography, or harmful to minors and demonstrates enforcement of the policies.</li> <li>● Copy of Informed Consent Form for Student Use of the Internet</li> </ul>	