



Background

The Elementary and Secondary Education Act, reauthorized in 2015 as the Every Student Succeeds Act (ESSA), was passed as a civil rights law to provide funding and resources to states, districts, and school leaders to enhance their capacity to meet the strengths and needs of educators and students in their community. Each Title program under ESSA has a specific purpose to provide focused resources to support students who are historically, or currently, marginalized and/or are experiencing barriers to an academically enriching curriculum in a safe and inclusive environment. The Federal Systems Team administers many of the grant programs under ESSA and partners with districts in the implementation and oversight of these programs.

Why We Monitor

1. **Building Relationships – We're in this together.** The main objective for the Montana Office of Public Instruction (OPI) is to raise student achievement for Montana's public-school children. Through cooperative assessment of the federal programs between the OPI and Montana school districts the quality of services to students will be strengthened and improved.
2. **Technical Assistance – We're here to help.** The OPI Federal Programs team provides technical assistance during the review and beyond. It is not the OPI's intent to tell the district how to run its title programs, but rather to answer questions, facilitate dialogue, and exchange ideas and information for program improvement while, at the same time, meeting all federal requirements.
3. **Compliance – It's the law.** Monitoring federal programs helps ensure that all children have a fair, equal, and significant opportunity to obtain a high-quality education. Monitoring is intended to be a collaborative partnership between the OPI and districts to ensure compliance with the Every Student Succeeds Act (ESSA).

While accountability to federal requirements is important, the goal of monitoring is to provide technical assistance and support districts in their implementation of federal programs.

Notice to all districts: Due to the wide range of district and school parental notification forms, and the fact that many do not meet federal requirements, beginning with School Year (SY) 2021-22, [Parent Notices by Pathwise/TransACT](#) documents must be used. Those sections where Pathwise/TransACT forms must be used are identified within the Monitoring Tool. The Montana Office of Public Instruction (OPI) pays for a state subscription to Pathwise/TransACT for all Montana districts. ***Pathwise/TransACT Parent Notices must be completed with LEA contact information, updated annually, and made available/accessible to parents and families.***

For the purposes of monitoring all student names should be redacted from submitted documents. Provide documentation in multiple languages as applicable.



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Common Compliance *(Required for all monitoring)*

If you have questions please contact Kimberly Rebich, Federal Grants Coordinator, Kimberly.Rebich@mt.gov, 406-410-4578.

Indicator #	Indicator	Annual Evidence to Maintain
CC-A	Expenditures are being maintained at the LEA for Title I-A and Title II-A areas. Expenditures are for allowable and approved activities. Expenditures supplement/not supplant state and local funds. (Subpart E-Cost principals of UGG)	<ul style="list-style-type: none"> • PDF copy of a detailed expenditure report for Title I and Title II A areas being monitored that shows date, vendor, item description and amounts for one month of the previous school year. (The district may select the month.) <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> • PDF copy of the district’s policy/methodology to meet the supplement, not supplant requirements required under the ESSA, if necessary. (N/A for single school/one school per grade span - K-8 and K-12 districts). *Policies must have been adopted or reviewed after October 2016 to comply with the ESSA. <ul style="list-style-type: none"> ○ MTSBA policy 7220 (if adopted) <p><i>If the district is required to set-aside funds to provide services to Homeless or Neglected and Delinquent students enrolled in non-Title I schools, please include a detailed report of how those funds were used.</i></p>
CC-B	The LEA has received the appropriate audit per CFR 200.501 audit requirements.	<ul style="list-style-type: none"> • LEA has submitted applicable audit to the OPI at OPIAuditReports@mt.gov. For questions about your school district's audit, contact OPIAuditReports@mt.gov.
CC-C	The LEA has a current inventory of any materials purchased with Title IA funds. This includes the specific location of the item.	<ul style="list-style-type: none"> • PDF copy of LEA fixed assets inventory of all equipment, materials, and non-consumable supplies. <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> • PDF Written assurance on district letterhead that the district only uses Title I-A funds to pay salaries and benefits only. <p style="text-align: center;">ESSA Quick Reference: Inventory</p>
CC-D	Materials, supplies, and equipment purchased with Title I-A funds are labeled as purchased with federal funds.	<ul style="list-style-type: none"> • PDF evidence that all equipment, materials, and non-consumable supplies purchased with Title I-A funds are labeled as purchased with federal funds <ul style="list-style-type: none"> ○ Verification done by written assurance on district letterhead ○ Pictures of labels on items <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> • PDF Written assurance on district letterhead that the district only uses Title I funds to pay salaries and benefits only and/or supplies purchased with Title I-A funds were consumable.



<p>CC-E</p>	<p>The LEA meets comparability requirements: 1. Policy to ensure equivalence among schools in teachers, administrators, and other staff 2. Policy to ensure equivalence among schools in the provision of curriculum materials and instructional supplies 3. A district-wide salary schedule</p>	<ul style="list-style-type: none"> • N/A if the district has only one school per grade span- K-8 and K-12 districts. OR • PDF copy of Building Staff Plans with data that indicates which staff are included and excluded in the comparability calculation worksheets. <ul style="list-style-type: none"> ○ Comparability Worksheet with data that indicates which staff are included and excluded in the comparability calculation (worksheet directions) ○ Board adopted policy is in place and being implemented ○ District-wide salary schedule
<p>CC-F</p>	<p>The LEA has internal controls to monitor time and effort.</p>	<ul style="list-style-type: none"> • PDF examples of the internal controls to monitor time reports for staff members paid out of federal funds. <ul style="list-style-type: none"> ○ Breakdown of Federally Funded Staff Positions ○ Timesheets/semi-annual certification of staff paid with federal funds
<p>CC-G</p>	<p>The LEA ensures that all teachers and paraprofessionals working in a program supported by funds under Title I, Part A meet applicable state certification and license requirements. Instructional Paraprofessionals must be under the direct supervision of a licensed teacher, ARM 10.55.715.</p>	<ul style="list-style-type: none"> • PDF written attestation on district letterhead stating all paraprofessionals have been trained by, and are under the direct supervision of, a certified/licensed teacher. AND • PDF <u>annual</u> parent notice the LEA provides or would provide to parents if/when parents request the qualifications of their student's teacher(s) and/or paraprofessionals. *The notice must include LEA contact information. <ul style="list-style-type: none"> ○ Pathwise/TransACT form TPQ-02 Teacher Qualification Response to Parents. AND • PDF <u>annual</u> parent notice for <u>each school</u> the LEA provides verifying the professional requirements for teachers and paraprofessionals for the school year. *The notice must be completed for each school and include LEA contact information. <ul style="list-style-type: none"> ○ Completed Pathwise/TransACT form TPQ-04 Verification of Teacher and Paraprofessional Qualifications
<p>CC-L</p>	<p>Describe how the LEA/agency, which provides child welfare services to the child, determines whether it is in the best interest of the child to remain in his or her school of origin. (Sec.1112(c)(5) (Sec. 1111(g)(1)(E))</p>	<ul style="list-style-type: none"> • PDF copy of LEA's Foster Care Point of Contact information including name, e-mail, and telephone number. AND • PDF copy of documentation from Best Interest Determination meeting. <ul style="list-style-type: none"> ○ Pathwise/TransACT form FC-01 - Meeting to Determine School Placement of a Student in Foster Care ○ Pathwise/TransACT form FC-05 - Students in Foster Care - Point of Contact Letter ○ Pathwise/TransACT form FC-02 - Educational Services for Students in Foster Care ○ Pathwise/TransACT form FC-03 - Determination of School Placement for a Student in Foster Care ○ Emails, meeting agendas, or other evidence may be used. AND • PDF evidence that the LEA POC and the local child welfare division are collaborating on placement and transportation decisions. <ul style="list-style-type: none"> ○ Pathwise/TransACT form FC-05 - Students in Foster Care - Point of Contact Letter ○ Emails, meeting agendas, or other evidence may be used. AND



		<ul style="list-style-type: none"> PDF Copies of any board adopted policies addressing the enrollment and transportation needs of children in foster care, including dates of adoption. (See MTSBA Policies 3110, 3121, and 8100.) . *Policies must have been adopted or reviewed after October 2016 to comply with the ESSA. <p>Ensuring Educational Stability and Success for Students in Foster Care - Non-Regulatory Guidance November 2024</p>
CC-M	Describe how the LEA tracks the progress of foster care students. (Sec. 1111(g)(1)(E))	<ul style="list-style-type: none"> PDF Evidence of the supports in place when attendance becomes a concern for a student in Foster Care AND PDF Evidence of the supports in place when academic performance becomes a concern for a student in Foster Care
CC-N	Describe how the LEA notifies the OPI of Tribal foster care students. (Sec. 1111(g)(1)(E))	<ul style="list-style-type: none"> PDF copy of documentation submitted to OPI regarding Tribal foster care students, if necessary. <p>Title I-A Documentation Checklist for Tribal Foster Care Students.</p>
CC-O	<p>Provide LEA assurance that children in foster care are immediately enrolled in a new school when a determination is made that remaining in their school of origin is not in their best interest.</p> <p>Provide LEA assurance that new enrolling school immediately contacts the school of origin to obtain relevant academic and other key records. (Sec. 1111(g)(1)(E))</p>	<ul style="list-style-type: none"> PDF LEA written assurance on district letterhead that children in foster care are immediately enrolled in a new school when a determination is made that remaining in their school of origin is not in their best interest. AND PDF LEA written assurance on district letterhead that new enrolling school immediately contacts the school of origin to obtain relevant academic and other key records. <p>Ensuring Educational Stability and Success for Students in Foster Care - Non-Regulatory Guidance November 2024</p>
CC-P	Summarize the policy criteria used to determine when the LEA provides a pupil who leaves foster care the right to remain enrolled in his or her school of origin. (Sec. 1112(c)(5))	<ul style="list-style-type: none"> PDF Copy of policy criteria explaining determination. <p>Ensuring Educational Stability and Success for Students in Foster Care - Non-Regulatory Guidance November 2024</p>
CC-Q	How long are transportation services provided for eligible foster care students.	<ul style="list-style-type: none"> PDF copy of transportation document <ul style="list-style-type: none"> Pathwise/TransACT form FC-04 - Determination of School Transportation for a Student in Foster Care. <p>Ensuring Educational Stability and Success for Students in Foster Care - Non-Regulatory Guidance November 2024</p>



Common Compliance Statewide Assessment *(Required for all monitoring)*

To ensure school districts meet the requirements under ESEA/ESSA Section 1111(b)(2) for implementing comparable, fair, valid and reliable assessment systems, the LEA must demonstrate compliance in [test administration](#), [test accessibility](#), [test security](#), [data use](#), and [test training](#) with items CC-H through CC-K. These requirements ensure statewide assessments are administered in a consistent and standardized way to measure student proficiency and progress on the State’s challenging academic standards over time and to address educational needs. *Updated 6/2026*

If you have questions please contact Marcy Fortner, Assessment Specialist, at MFortner@mt.gov or 406-444-3511

Indicator #	Indicator	Annual Evidence to Maintain
CC-H	<p>STUDENT PARTICIPATION IN STATE ASSESSMENTS AND ASSURANCE OF ACCESSIBILITY (Sec. 1111(b)(2)(B)(vii)(I)) (Sec. 1111(b)(2)(D)(i)) (Sec. 1111(b)(2)(D)(i)(I)) (Sec. 1111(b)(2)(B)(vii)(II)) 34 CFR Part §200.6 (Sec. 1111(b)(2)(D)(i)(I)) (Sec. 1111(b)(2)(B)(vii)(III)) (Sec. 1111(b)(2)(G)) (Sec. 1111(b)(2)(D)(i)(II)) (Sec. 3111(b)(2)(A))</p>	<p>The district submitted the Test Administration Plan and the Test Accessibility Plan as part of the System Test Coordinator’s assurances to test security.</p> <ul style="list-style-type: none"> • Student inclusion to the fullest extent practicable: <ul style="list-style-type: none"> ○ Submit evidence supporting Item 7.9, Parent Participation Notice of the Test Administration Plan. • Meaningful participation in state assessments: <ul style="list-style-type: none"> ○ Submit evidence supporting Items 2.13, Gain Familiarity and Comfort and/or 2.14, Test Delivery System Configuration of the Test Accessibility Plan.
CC-I	<p>ENSURING THE INTEGRITY AND RELIABILITY OF STATE ASSESSMENTS. (Sec.1202(a)(1)(A)) (Sec. 1202(e)(1)(A) through (C)) (Sec. 1202(e)(1)(A))</p>	<p>The district submitted the Test Security Plan as part of the System Test Coordinator’s assurances to test security.</p> <ul style="list-style-type: none"> • Data Integrity and Reliability of Student Achievement Results: <ul style="list-style-type: none"> ○ Submit evidence to support Item 3.7, Test Administrator Observation of the Test Security Plan.
CC-J	<p>COMMUNICATE INFORMATION WITH PARENTS AND THE PUBLIC (Sec. 1112(e)(2)(A)) (Sec. 1111(b)(2)(B)(x)) CFR Part §200.6</p>	<p>The district submitted the Data Use Plan as part of the System Test Coordinator’s assurances to test security.</p> <ul style="list-style-type: none"> • Notice to families about student individualized score reports: <ul style="list-style-type: none"> ○ Submit evidence to support any two of Items 4.2 through 4.7, sharing of score reports with parents of the Data Use Plan.
CC-K	<p>ENSURE COMPLETED TRAINING AND AWARENESS OF STANDARDIZED PROTOCOLS (Sec. 1111(b)(2)(B)(iii) through (iv)) (Sec. 1202(e)(1)(A))</p>	<p>The district submitted the Test Training Plan as part of the System Test Coordinator’s assurances to test security.</p> <ul style="list-style-type: none"> • Evidence of local activities used to implement the standardized protocols for a Test Security Plan: <ul style="list-style-type: none"> ○ Submit evidence to support any two of Items 5.3 through 5.7, training and certification requirements of the Test Training Plan.



Title I, Part A – Improving Basic Programs Operated by Local Educational Agencies

Title I-A provides federal dollars to supplement educational opportunities for students experiencing poverty and students who experience significant challenges meeting Montana's academic standards. Montana focuses monitoring for Title I-A on reviewing school-level Title I-A plans and procedures, and each school's process for communicating and partnering with parents and families.

If you have questions please contact Kimberly Rebich, Federal Grants Coordinator, Kimberly.Rebich@mt.gov, 406-410-4578.

Indicator #	Indicator	Annual Evidence to Maintain
Parent Right-to-Know (ESEA 1112) (Required for all Title I, Part A LEAs)		
IA-E	At the beginning of each school year, the local educational agency (LEA) notified parents in all Title I-A served buildings that they may request information regarding the professional qualifications of the student's classroom teachers. 1112(e)(1)(A)	<ul style="list-style-type: none"> • PDF <u>annual</u> notice for each school to parents at the beginning of the school year that they may request, and the LEA will provide information regarding the professional qualifications of the students' teachers and paraprofessionals, as appropriate. *The notice must be completed for each school and include LEA contact information. <ul style="list-style-type: none"> ○ Completed Pathwise/TransACT form TPQ-01 Annual Parent Notice: Right to Request Teacher Qualifications <li style="text-align: center;">AND • PDF annual evidence of how this notice was disseminated by the LEA for each Title I-A school, in multiple languages as applicable. <ul style="list-style-type: none"> ○ District website ○ Parent handbook ○ Enrollment packet
IA-F	The LEA provides timely notice to parents of students in Title I-A served schools if the child has been assigned to be taught or has been taught for four or more consecutive weeks by a teacher who does not meet the applicable state certification or license requirements at the grade level in which the teacher has been assigned. 1112(e)(1)(B)(i)	<ul style="list-style-type: none"> • PDF <u>annual</u> notice the LEA provides or would provide that informs a parent/guardian when their student has been assigned or has been receiving instruction for 4 or more consecutive weeks by a teacher who does not meet state certification or licensure requirements for the grade level and/or subjects in which the teacher has been assigned. *The notice must include LEA contact information. <ul style="list-style-type: none"> ○ Pathwise/TransACT form TPQ-03 Notice of Teacher Status ○ Samples of notifications in multiple languages as applicable.



Schoolwide Program (ESEA 1114) (Required for Title I, Part A Schoolwide Programs)		
<p>IA-G</p>	<p>SCHOOLWIDE PROGRAM PLAN The LEA has a Title I, Part A Schoolwide Plan that is developed with the involvement of parents and other members of the community that is available and accessible to parents and the public and meets all the requirements under Sec. 1114.</p>	<ul style="list-style-type: none"> PDF copy of the most current reviewed and revised Title I, Part A Schoolwide Program Plan for <u>each school</u> that includes: <ol style="list-style-type: none"> Parent and Community Stakeholder Involvement Comprehensive Needs Assessment Schoolwide Plan Strategies Coordination and Integration with other Federal, State, and local services, resources, and programs, and outlines the ways in which funds are to be braided Evaluation and Plan Revision <p>Title I Schoolwide Program Plan template</p> <p style="text-align: center;">AND</p> PDF evidence that the Title I, Part A Schoolwide Plan for <u>each school</u> is available and accessible to parents and the public. <ul style="list-style-type: none"> District website Parent handbook Enrollment packet <p><i>If there are non-Title I schools located in the district, the Title I, Part A Schoolwide Plans must include processes to provide services to Homeless and Neglected and Delinquent students who may be enrolled in those schools.</i></p>
<p>IA-H</p>	<p>SCHOOLWIDE PROGRAM PLAN REVIEW The Title I, Part A Schoolwide Plan is regularly reviewed, evaluated, and revised as necessary based on student needs to ensure that all students are provided opportunities to meet the challenging State academic standards with the involvement of parents and other members of the community to be served. Sec. 1114 (b)</p>	<ul style="list-style-type: none"> PDF evidence that the Title I, Part A Schoolwide Program Plan for <u>each school</u> and its implementation is regularly reviewed, evaluated, and revised as necessary based on student needs to ensure that all students are provided opportunities to meet the challenging State academic standards with the involvement of parents and other members of the community to be served. <ul style="list-style-type: none"> PDF notice for <u>each school</u> inviting parents and other stake-holder groups to participate in the development, review, or revision of each school’s Title I, Part A Schoolwide Plan. *The notice must be completed for <u>each school</u> and include LEA contact information. <ul style="list-style-type: none"> Completed Pathwise/TransACT form SW-02 Title I Schoolwide Planning Meeting. This notice must include meeting date, time, location, and LEA contact information. Written attestation on LEA letterhead describing the review/revision/evaluation process of the Title I, Part A Schoolwide Plan for each school. Evidence of a completed evaluation process and tool for each school.
<p>IA-I</p>	<p>SCHOOLWIDE PROGRAM PROCESS District has a process in place to identify its most at-risk group of students and a process to monitor student academic improvement. Sec. 1112(b)(1) (A-D); Sec. 1114 (b)(6); Sec. 1114 (b)(7)(A)(i-iii)(I)</p>	<ul style="list-style-type: none"> PDF evidence of the benchmark assessments used to measure student progress for <u>each school</u>. <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> PDF evidence of a benchmark assessment schedule timetable for <u>each school</u>. <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> PDF evidence from a benchmark assessment report showing student academic achievement and growth on the benchmark assessments for <u>each school</u>.



Targeted Assistance Program (ESEA 1115) (Required for Title I, Part A Targeted Assistance Programs)		
<p>IA-J</p>	<p>TARGETED ASSISTANCE PROGRAM PLAN The LEA has a Title I, Part A Targeted Assistance Plan that is available and accessible to parents of students served by Title I, Part A and meets all the requirements under Sec. 1115.</p>	<ul style="list-style-type: none"> • PDF copy of the LEA Title I, Part A Targeted Assistance Program Plan for <u>each school</u> that includes: <ol style="list-style-type: none"> 1. A process for identifying the strengths and weaknesses impacting student performance. 2. Criteria for identifying eligible Title I, Part A students that is objective, educationally related, and includes multiple measures. 3. Identifies the practices, strategies, and instructional delivery methods of services to eligible Title I, Part A students 4. Coordination with the school's overall education program. 5. Includes strategies the school will use to engage parents and families of students served by the Targeted Assistance program. 6. Integrates professional development into teachers, principals and other school leaders, and paraprofessionals who work with eligible Title I, Part A students. <p style="text-align: center;"><u>Title I, Part A Targeted Assistance Program Plan template</u> AND</p> <ul style="list-style-type: none"> • PDF evidence that the Title I, Part A Targeted Assistance Program Plan for <u>each school</u> is available and accessible to parents of students served by Title I, Part A. <ul style="list-style-type: none"> ○ District website ○ Parent handbook ○ Enrollment packet <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> • PDF evidence that the LEA verifies <u>annually</u> that each student receiving Title I-A services is properly marked as receiving Title I services in the student's Enrollments section of system Infinite Campus/AIM. Students who have been identified as homeless or as neglected (living in a group home for children in the custody of Child and Family Services) must be identified in Infinite Campus/AIM as Title I students. <ul style="list-style-type: none"> ○ Written verification <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> ○ Screenshot from a student's Enrollments section in Infinite Campus/AIM <p style="text-align: center;"><i>If there are non-Title I schools located in the district, the Targeted Assistance Plans must include processes to provide services to Homeless and Neglected and Delinquent students who may be enrolled in those schools.</i></p>
<p>IA-K</p>	<p>TARGETED ASSISTANCE PROGRAM The LEA has a process in place that ensures that all children served by Title I in a Targeted assistance building are found eligible using multiple academically related, objective criteria. ESEA 1115(b)</p>	<ul style="list-style-type: none"> • PDF evidence of an annual list of identified Title I, Part A students receiving services for <u>each school</u> (protect student confidentiality) <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> • PDF evidence of the benchmark assessments used to determine which students will be served for <u>each school</u>. <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> • PDF evidence of the benchmark assessment schedule timetable for <u>each school</u>. <p style="text-align: center;">AND</p>



		<ul style="list-style-type: none"> • PDF evidence of a benchmark assessment report showing student academic achievement and growth on the benchmark assessments for <u>each school</u>.
<p>Parent and Family Engagement in Title I, Part A (ESEA 1116) (Required for all Title I, Part A LEAs)</p>		
<p>IA-L</p>	<p>PARENT & FAMILY ENGAGEMENT WRITTEN POLICY There is an LEA written policy containing all the required elements that are evaluated/reviewed annually with input from parents and family members of students served by the Title I program, 1116 (a)(2).</p>	<ul style="list-style-type: none"> • PDF written Parent and Family Engagement Policy *Policies must have been adopted or reviewed after October 2016 to comply with the ESSA. <ul style="list-style-type: none"> ○ MTSBA Policy 2158 <li style="text-align: center;">AND • PDF written Title I Parent and Family Engagement Policy * Policies must have been adopted or reviewed after October 2016 to comply with the ESSA. <ul style="list-style-type: none"> ○ MTSBA Policy 2160 <li style="text-align: center;"><u>Title I, Part A District Parent and Family Engagement Policy Required Components</u> <li style="text-align: center;">AND • PDF evidence of an <u>annual</u> review/evaluation, with the meaningful involvement of parents and family members of students served by the Title I, Part A program, of the content and effectiveness of the district written Title I, Part A Parent and Family Engagement Policy in improving the academic quality of all schools served under Title I, Part A. <ul style="list-style-type: none"> ○ PDF <u>annual</u> notice inviting all parents of students served by the Title I, Part A program to a meeting for the required review and revision of the required district parent and family engagement policy. *This notice must include meeting date, time, location, and LEA contact information. <ul style="list-style-type: none"> ▪ Completed <u>Pathwise/TransACT form PFE-01 District Parent and Family Engagement Policy Meeting Invitation to Participate</u> ○ Surveys ○ Meeting agenda
<p>IA-M</p>	<p>TITLE I, PART A SCHOOL PARENT AND FAMILY ENGAGEMENT PLAN/POLICY Each school has a policy/plan developed with input from parents and family members of students served by the Title I program. The plan is made available to parents and the local community and is updated periodically to meet the changing needs of parents and the school, 1116(b).</p>	<ul style="list-style-type: none"> • PDF copy of the Title I, Part A School Parent & Family Engagement Plan/Policy for <u>each school</u> that includes the school's processes for the following: <ol style="list-style-type: none"> 1. Involvement of parents of Title I, Part A served students in the development, review, and revision of the plan. 2. Dissemination of the plan to parents of Title I, Part A, served students. 3. Title I, Part A Annual Meeting to inform parents of Title I, Part A, served students of their school's participation in Title I, Part A, the requirements of the program, and the right of the parents to be involved. 4. Shared responsibilities for high student academic achievement – School-Parent Compact 5. Building Parent Family Engagement Capacity for parents and staff of Title I, Part A, served students. <li style="text-align: center;"><u>Title I, Part A School Parent and Family Engagement Plan Required Components</u> <li style="text-align: center;"><u>Title I, Part A Parent and Family Engagement District Policy AND School Plan Components Checklist</u> <li style="text-align: center;"><u>Title I, Part A School Parent and Family Engagement Plan template</u> <li style="text-align: center;">AND • PDF evidence of dissemination of the Title I, Part A School Parent & Family Engagement Plan/Policy to parents/guardians of students served by the Title I, Part A program, for <u>each school</u>. <ul style="list-style-type: none"> ○ District website



		<ul style="list-style-type: none"> ○ Parent handbook ○ Enrollment packet
IA-N	The LEA reserves no less than 1% of its Title I-A allocation (if over \$500,000) for parent and family engagement activities, including promoting family literacy and parenting skills. 1116(a)	<p style="text-align: center;"><i>N/A if District receives less than \$500,000 in Title IA</i></p> <ul style="list-style-type: none"> ● PDF evidence that funds are used to promote parent and family engagement activities
IA-O	<p>TITLE I, PART A ANNUAL PARENT MEETING</p> <p>An annual meeting is convened to inform Title I and Migrant parents and families of their school's participation in Title I, to explain Title I requirements, and the right of parents and families to be meaningfully engaged in their child's education. 1116 (b)(c)</p>	<ul style="list-style-type: none"> ● PDF <u>annual notice</u> for <u>each school</u> inviting parents of students served by the Title I, Part A program to an annual Title I, Part A Parent Meeting to inform parents of their school's participation in Title I, Part A. The meeting must explain the requirements of Title I, Part A, and explain the right of the parents to be involved in the review and revision of both the district written parent and family engagement policy and the school parent and family engagement plan. This meeting is different from the annual policy evaluation districts are required to conduct with parents and family members of children served by Title I, Part A programs. *The notice must be completed for each school and include LEA contact information. <ul style="list-style-type: none"> ○ Completed Pathwise/TransACT form PFE-12 Parent and Family Engagement Meeting, Invitation to Participate <p style="text-align: center;"><u>Title I, Part A Annual Meeting Required Components</u></p> <p style="text-align: center;">AND</p> ● PDF evidence for <u>each school</u> of the required annual Title I, Part A Parent Meeting to inform parents of their school's participation in Title I, Part A. The meeting must explain the requirements of Title I, Part A, and explain the right of the parents to be involved in the review and revision of both the district written parent and family engagement policy and the school parent and family engagement plan. This meeting is different from the annual policy evaluation districts are required to conduct with parents and family members of children served by Title I, Part A programs announcement <ul style="list-style-type: none"> ○ Meeting agenda ○ PowerPoint presentation ○ Evidence of information shared with families at the annual meeting, handouts <p style="text-align: center;"><u>Title I, Part A Annual Meeting Required Components</u></p>
IA-P	<p>SCHOOL-PARENT COMPACT</p> <p>Each Title I school develops, in partnership with Title I and Migrant parents and families, School-Parent Compact. School distributes compact to parents and families annually. 1116 (d) Elementary schools must distribute compacts at a parent-teacher conference and explain how they relate to the child's</p>	<ul style="list-style-type: none"> ● PDF <u>annual notice</u> of the School-Parent Compact for <u>each school</u> describing the shared role and responsibility of the school and parents to work in partnership to support their child's learning and success in school. *The notice must be completed for each school and include LEA contact information. <ul style="list-style-type: none"> ○ Evidence of completed Pathwise/TransACT form PFE-06a or PFE-06b School-Parent Compact



	individual achievement. 1116(d)(2)(A)	
IA-Q	<p>BUILDING CAPACITY FOR PARENT & FAMILY INVOLVEMENT</p> <p>Each school shall carry out activities and strategies that are aligned with the LEA’s parent and family engagement policy to ensure effective involvement of parents of students served by the Title I, Part A program, and to support a partnership among the school, parents, and the community to improve student academic achievement. 1116(e)</p>	<ul style="list-style-type: none"> • PDF description and timeline of <u>annual</u> Title I, Part A Parent and Family capacity activities for <u>each school</u> (distinct from the Title I, Part A Annual Parent Meeting) for parents and staff that support a partnership among the school, parents, and the community to improve student academic achievement. AND • PDF evidence of Title I, Part A Parent and Family capacity activities for <u>each school</u> for parents and staff (distinct from the Title I, Part A Annual Meeting). <ul style="list-style-type: none"> ○ Building Parent Capacity Activity Log ○ Invitations ○ PowerPoint ○ Activity materials ○ Training agendas ○ Sign-in sheets <p><i>*Activities offered using Title I funds must provide information to, or build the capacity of staff, parents, and families to support the academic achievement of their child. Open house, Parent/Teacher conferences, Muffin/Donut days, BBQs, or other meet and greet type activities are <u>not</u> acceptable.</i></p>
School Support and Improvement (ESEA 1111(d)(1) and (2)) (Required for Title I, Part A LEAs designated as CSI & TSI)		
IA-A	<p>COMPREHENSIVE SUPPORT AND IMPROVEMENT</p> <p>Upon receiving such information from the State, the local educational agency shall, for each school identified by the State and in partnership with stakeholders (including principals and other school leaders, teachers, and parents), locally develop and implement a comprehensive support and improvement plan for the school to improve student outcomes.</p>	<ul style="list-style-type: none"> • PDF notice/invitation to parents to attend a meeting regarding the identification by the State of their child’s school for Comprehensive Support and Improvement. Input is required from parents and other stakeholders regarding the development of a plan to improve the school’s academic achievement. *This notice must include meeting date, time, location, and LEA contact information. <ul style="list-style-type: none"> ○ Completed Pathwise/TransACT form SSI-02 School Comprehensive Support and Improvement Planning Meeting: Invitation to Participate
IA-B	<p>TARGETED SUPPORT AND IMPROVEMENT</p> <p>Each school receiving a notification described in this paragraph, in partnership with stakeholders (including principals</p>	<ul style="list-style-type: none"> • PDF notice/invitation to parents to attend a meeting regarding the identification by the State of their child’s school for Targeted Support and Improvement. It explains that identification is based on a measure of consistently under-performing subgroups of students at the school. *This notice must include meeting date, time, location, and LEA contact information. <ul style="list-style-type: none"> ○ Evidence of completed Pathwise/TransACT form SSI-05 School Targeted Support and Improvement Planning Meeting: Invitation to Participate



	<p>and other school leaders, teachers and parents), shall develop and implement a school-level targeted support and improvement plan to improve student outcomes based on the indicators in the statewide accountability system established under subsection (c)(4) for each subgroup of students that was the subject of notification.</p>	
<p>IA-C</p>	<p>COMPREHENSIVE & TARGETED SCHOOL SUPPORT AND IMPROVEMENT The school ensures teachers use instructional strategies that are reflected in the professional development activities outlined in the school improvement plan.</p>	<ul style="list-style-type: none"> • PDF documentation of Professional Development in Instructional Strategies. <li style="text-align: center;">AND • PDF evidence that teachers are implementing these strategies: <ul style="list-style-type: none"> ○ Walkthroughs ○ Peer to Peer observations ○ Teacher reflection
<p>IA-D</p>	<p>COMPREHENSIVE & TARGETED SCHOOL SUPPORT AND IMPROVEMENT The LEA assists the school in implementing the evaluation process as described in the school improvement plan.</p>	<ul style="list-style-type: none"> • PDF evidence of the LEA process for monitoring and evaluating the school improvement plans: <ul style="list-style-type: none"> ○ Meeting agendas ○ sign-in sheets ○ minutes <li style="text-align: center;">AND • PDF evidence of improvement plan evaluation tool



Participation of Children Enrolled in Private Schools (ESEA 1117)(Required for all districts)

Districts that receive federal funds under ESEA and in which private schools are located must, after meaningful and timely consultation with private school officials, provide equitable services to eligible private school children, their families and educators. The focus of monitoring is on the district’s consultation and communication with private schools, as well as the programs provided in equitable service programs.

If you have questions please contact Zach Hawkins, Title I and Federal Programs Director, Private School Ombudsman, zachariah.hawkins@mt.gov, 406-444-3083.

Indicator #	Indicator	Annual Evidence to Maintain
PS-A	<p style="text-align: center;">CONSULTATION</p> <p>The LEA has complied with the requirements for consultation with private school officials in a timely manner. 1117(b)(1)</p>	<ul style="list-style-type: none"> • *REQUIRED FOR ALL LEAs - PDF copy of completed Pathwise/TransACT form PSC-04 Federal Requirements for Providing Equitable Public School Services to Private School and Private School Ombudsman Information <p>*The following documentation is required if the LEA has Private/Non-Public and/or homeschools receiving services:</p> <ul style="list-style-type: none"> • PDF copy of School District Affirmation of Consultation with Private Schools • Copies of letters and all communication sent to private schools. • Copy of written affirmations signed by private school officials that consultation occurred.
PS-B	<p style="text-align: center;">EQUITABLE SERVICES</p> <p>Educational services, resources, and other benefits to students, teachers, and parents of private schools are equitable to those who attend private schools. [20 U.S.C. 6320]</p>	<p>*The following documentation is required if the LEA has Private/Non-Public and/or homeschools receiving services:</p> <ul style="list-style-type: none"> • PDF copy of agreements pertaining to provided services. Sec. (1117 (b)(1)A-L <ul style="list-style-type: none"> ○ Title I Equitable Share Services Agreement • Description of services provided to private schools.
PS-C	<p style="text-align: center;">PROFESSIONAL DEVELOPMENT</p> <p>The LEA provided opportunities for teachers of participating private schools to participate, on an equitable basis, in professional development activities. 1120(a), 2122(b), 5142 (a), 9501</p>	<p>*The following documentation is required if the LEA has Private/Non-Public and/or homeschools receiving services:</p> <ul style="list-style-type: none"> • Documentation of private school teachers’ participation in professional development activities. <p>Note: Title II, Part A funds can only be used for professional development.</p>
PS-D	<p style="text-align: center;">COMPLAINT PROCEDURE</p> <p>The LEA maintains records of its effort to resolve any complaints made by private school representatives. 1117(b)(2)</p>	<p>*The following documentation is required if the LEA has Private/Non-Public and/or homeschools receiving services:</p> <ul style="list-style-type: none"> • Pathwise/TransACT form PSC-04 • Copy of complaint procedure. • Evidence that complaint procedure has been shared with private schools. • Documentation of communication with private schools regarding complaints.



<p>PS-E</p>	<p style="text-align: center;">FIXED ASSETS INVENTORY</p> <p>The LEA retains control of and includes an inventory of fixed assets for all equipment purchased with funds for private schools. 1117(b)(1)</p>	<p>*The following documentation is required if the LEA has Private/Non-Public and/or homeschools receiving services:</p> <ul style="list-style-type: none"> • LEA fixed assets inventory for each private school. (This includes computers, laptops, servers, projectors, smartboards, etc.)
<p>PS-F</p>	<p style="text-align: center;">SERVICES</p> <p>Services provided to private school children were provided by employees of the LEA or under contract with the LEA. 1117(b)(2)(A)(B)</p>	<p>*The following documentation is required if the LEA has Private/Non-Public and/or homeschools receiving services:</p> <ul style="list-style-type: none"> • Contracts/MOUs/LOAs of individuals or third-party entities that are providing services to private school children.
<p>PS-G</p>	<p style="text-align: center;">TITLE I, PART A PROGRAM EVALUATION</p> <p>The LEA establishes an assessment to measure the effectiveness of the Title IA program against the agreed upon standards established in the consultation agreement. 1117(b)(3)</p>	<p>*The following documentation is required if the LEA has Private/Non-Public and/or homeschools receiving services:</p> <ul style="list-style-type: none"> • Completed copy of the program evaluation. • Description of the program modifications, if any, that will be made if the annual progress goals are not met.



Title II, Part A – Supporting Effective Instruction

The purpose of Title II-A is to strengthen the educator workforce at the school and district level as well as enhance the capacity of school and district leaders to meet identified strengths and needs of their teachers and leaders. Title II-A focuses on preparing, training, and recruiting high-quality teachers and school leaders. The focus of Title II-A monitoring is on the district’s implementation and evaluation of strategies to improve the practice of its educators.

If you have questions please contact Marisa Britton-Bostwick, Title II, Part A Specialist, marisa.britton-bostwick@mt.gov, 406-444-0794.

Indicator #	Indicator	Annual Evidence to Maintain
Recruitment and Retention		
IIA-A	The district has used funds to recruit, hire and retain effective teachers, especially in schools with many at-risk students; and to improve within-district equity in the distribution of high-quality teachers. <ul style="list-style-type: none"> • Expert help in screening candidates • Differential and incentive pay in high need academic subject areas • Opportunities for advancement and professional growth • Mentoring programs • Recruiting effective teachers to reduce class-size 	<ul style="list-style-type: none"> • Copies of agreements with outside organizations used to recruit and hire effective teachers • Copies of district interview questions • Provide narrative explaining differential, incentive, and retention pay • Provide narrative explaining mentorship program
IIA-B	Recruiting qualified individuals from other fields to become teachers, principals, or other school leaders, including mid-career professionals from other occupations, former military personnel, and recent graduates of institutions of higher education with records of academic distinction who demonstrate potential to become effective teachers, principals, or other school leaders.	<ul style="list-style-type: none"> • List of recruiting tools used to hire effective teachers. Include teacher’s name, role, and certification.
IIA-C	The district has used funds to develop or improve a rigorous, transparent, and fair evaluation and support system for teachers, principals, and school leaders. <ul style="list-style-type: none"> • Based on student growth and achievement • Based upon multiple measures of educator performance • Must provide clear and timely feedback 	<ul style="list-style-type: none"> • Copy of educator evaluation tool that includes a description of the data and processes used • Evidence of staff participation in meetings to develop and improve the evaluation and Support - system-agenda, minutes, sign-in sheet
IIA-D	Developing feedback mechanisms to improve working conditions at school	<ul style="list-style-type: none"> • Copy of report results of educator support and working conditions feedback survey



Professional Development

<p>IIA-E</p>	<p>The district has used funds to provide high-quality, personalized professional development activities.</p> <ul style="list-style-type: none"> • Improve the knowledge of staff • Effective instructional strategies, methods, and skills • Use of challenging State academic content standards, student academic achievement standards, and State assessments • Involve collaborative groups • Provide training on how to teach and address the needs of all students including: <ul style="list-style-type: none"> • Students through age eight, including preschool • Children with disabilities • Children with significant cognitive disabilities • English learners • Grade level transitions • Gifted and Talented (including high-ability students who have not been formally identified for gifted education services) 	<ul style="list-style-type: none"> • Copy of district’s goals and objectives for the year showing how the district will reach the highest percentage of children • Narrative explaining the prioritization of funds and activities for the year • Explain how the administration is supporting professional development for teachers. • Explain how the district is working with Head Start and/or the local preschool programs. • Narrative explaining how gifted and talented students are identified and how services are provided to other high-ability students who have not been identified for gifted education services.
<p>IIA-F</p>	<p>The district has used funds to use data and ongoing consultation to continually update and improve activities.</p> <ul style="list-style-type: none"> • Provide training on how to understand and use data and assessments to improve classroom practice and student learning 	<ul style="list-style-type: none"> • Narrative explaining the improvement of professional development and activities associated with increasing student achievement
<p>IIA-G</p>	<p>Carrying out in-service training for school personnel in:</p> <ul style="list-style-type: none"> • Techniques and supports needed to help educators understand when and how to refer students affected by trauma, and/or mental illness • Prevent and recognize child sexual abuse • Use of referral mechanisms that effectively link children to the appropriate treatment and intervention services • Forming partnerships with mental health programs or organizations • Addressing issues related to school conditions for students learning 	<ul style="list-style-type: none"> • Narrative explaining what in-service training for school personnel has been provided • Narrative explaining what training was provided and how the district determined if the training was successful



IIA-H	Providing training, technical assistance, and capacity-building in local educational agencies to assist teachers, principals, or other school leaders with selecting and implementing formative assessments, designing class-room-based assessments, and using data from such assessments to improve instruction and student academic achievement.	<ul style="list-style-type: none"> • Narrative explaining what training was provided, and how the district determined if the training was successful
IIA-I	Developing and providing professional development and other comprehensive systems of support for teachers, principals, or other school leaders to promote high-quality instruction and instructional leadership in science, technology, engineering, and mathematics subjects, including computer science	<ul style="list-style-type: none"> • Narrative explaining what content-area-specific professional development the staff attend. Include staff names, content area and professional training
IIA-J	Providing high-quality professional development for teachers, principals, or other school leaders on effective strategies to integrate rigorous academic content, Career and Technical Education, and work-based learning.	<ul style="list-style-type: none"> • Narrative explaining what professional development was provided regarding Career and Technical Education and work-based learning
Class-size Reduction		
IIA-K	Reducing class-size to a level that is evidence based, to the extent the State (in consultation with local educational agencies in the State) determines that such evidence is reasonably available, to improve student achievement through the recruiting and hiring of additional effective teachers.	<ul style="list-style-type: none"> • Explain why the district reduced the class-size, and what professional development • the district is providing for the newly hired teacher. • Provide data to show the effectiveness of class-size reduction.
School Library Programs		
IIA-L	Supporting the instructional services provided by effective school library programs.	<ul style="list-style-type: none"> • Narrative explaining what services were provided for the school library program
Other		
IIA-M	Carrying out other activities that are evidence based, to the extent the State (in consultation with local educational agencies in the State) determines that such evidence is reasonably available.	<ul style="list-style-type: none"> • Narrative explaining what evidence-based activities the district participated in during the year



Title III - English Language Acquisition, Language Enhancement, and Academic Achievement Act *(Required for all districts)*

Title I-A and Title III-A provide federal dollars to supplement educational opportunities for students who have been identified as English Learners. English Learners fall under both Title I-A and Title III-A programs. Montana focuses monitoring for Title I-A and Title III-A on reviewing school-level plans and procedures for supporting English Learners, and each school’s process for communicating/partnering with parents and families of English Learners.

Title I, Part A – “The purpose of this title is to provide all children significant opportunity to receive a fair, equitable, and high-quality education, and to close educational achievement gaps.” (ESSA, Section 1001)

Title III, Part A-English Language Acquisition, Language Enhancement, and Academic Achievement – “The purpose of this subpart is (1) to help ensure that English learners, including immigrant children and youth, attain English proficiency and develop high levels of academic achievement in English; (2) to assist all English learners, including immigrant children and youth, to achieve at high levels in academic subjects so that all English learners can meet the same challenging State academic standards that all children are expected to meet; (3) to assist teachers (including preschool teachers), principals and other school leaders, State educational agencies, local educational agencies, and schools in establishing, implementing, and sustaining effective language instruction educational programs designed to assist in teaching English learners, including immigrant children and youth; (4) to assist teachers (including preschool teachers), principals and other school leaders, State educational agencies, and local educational agencies to develop and enhance their capacity to provide effective instructional programs designed to prepare English learners, including immigrant children and youth, to enter all-English instructional settings; and (5) to promote parental, family, and community participation in language instruction educational programs for the parents, families, and communities of English learners.” (ESSA, Sec. 3102)

If you have questions please contact Marisa Britton-Bostwick, Title III Specialist, marisa.britton-bostwick@mt.gov, 406-444-0794.

Indicator #	Indicator	Annual Evidence to Maintain
<p>IIIA-A</p>	<p>STUDENT IDENTIFICATION</p> <ul style="list-style-type: none"> The LEA accurately identifies all potential English Learners using the Statewide Home Language Survey (HLS) for all newly enrolled students. [Title VI of the Civil Rights Act of 1964; ESSA, Section 3113(b)(2)] The LEA uses the state approved English language proficiency screener aligned to the State’s English language proficiency standards and the State’s academic content standards. [Title VI of the Civil Rights Act of 1964] [ESSA, Section 1112(e)(3)(A)] The LEA accurately qualifies and places eligible EL students in a Language Instruction Educational Program (LIEP) within 30 days using the statewide standardized entrance criteria and process. [Title VI of the Civil Rights Act of 1964; ESSA, Section 1112(e)(3)(A); ESSA, Section 3113(b)(2)] Each LEA using funds under this part or title III to provide a 	<ul style="list-style-type: none"> All districts submit a copy of the Home Language Survey that is given to ALL students upon enrollment. (It can be a blank copy) All districts submit written procedures for identifying potential English Learners which may include: <ul style="list-style-type: none"> Written procedures for identifying potential English Learners in participating non-public schools, if applicable Written procedures for identifying potential English Learners in facilities for neglected and/or delinquent children, if applicable <p>AND If the district has students identified as English Learners in the SY being monitored:</p> <ul style="list-style-type: none"> List of students (use initials, or numbers, not names) who took the WIDA Screener, indicating the date when students enrolled in school and the date when the test was administered. List of all personnel administering state ELP testing (including proof of WIDA certification). Sample parent notification letter of an identified English Learner explaining the



	<p>language instruction education program as determined under title III shall, not later than 30 days after the beginning of the school year, inform parents of an English learner identified for participation or participating in such a program. [ESSA, Section 1112(e)(3)(A)(i-vii)]</p>	<p>reasons for identification, level of proficiency (score report and explanation), methods of instruction, and specific exit requirements.</p> <ul style="list-style-type: none"> ○ This letter shall be in an understandable and uniform format and, to the extent practicable, provided in a language that the parents can understand (if applicable).
<p>IIIA-B</p>	<p style="text-align: center;">SERVICES AND PROGRAMS</p> <ul style="list-style-type: none"> • Each student identified for EL Services receives a high-quality program of instruction that uses approaches, methodologies, and curricular materials/resources that are evidence based and proven effective with English Learners. EL programming and services are provided in comparable facilities that do not unreasonably segregate EL students. [Title VI of the Civil Rights Act of 1964; Castañeda v Pickard [648 F.2d 989 (5th Cir. 1981)], [Lau v. Nichols (1974)] • The LEA demonstrates that the Core EL program and academic courses indicate that English Learners are achieving and sustaining parity of linguistic and academic achievement with students who entered the LEA’s school system already proficient in English. [Title VI of the Civil Rights Act of 1964, [648 F. 2d 989 (5th Circuit, 1981)] • EL students are identified and qualified for special programs (Title I, Special Ed, Gifted and Talented) in a timely manner as compared with their English-only peers. EL staff are involved in the placement/programming for ELs participating in special programs. [Title VI of the Civil Rights Act of 1964] • The LEA accurately exits eligible EL students from a Language Instruction Education Program (LIEP) within the school year, using the statewide-standardized exit criteria and process. [ESSA, Section 3113(b)(2)] • The LEA monitors, for a minimum of two years, up to four years, the progress of students exited from the program. [Title VI of the Civil Rights Act of 1964] 	<ul style="list-style-type: none"> • N/A District did not have any students identified as English Learners in SY being monitored. <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> • Written descriptions of EL services and curricular resources/materials provided by the Language Instruction Educational Program (LIEP) core program (e.g., course descriptions, curriculum map, scope and sequence, interventions.) <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> • Written procedures for intervention in the absence of progress towards English language proficiency or when that progress does not correlate with overall academic achievement. • Documentation or written description of EL personnel’s collaboration in IEP meetings for EL students who are also qualified for special programs such as, Title I, Special Education, Gifted and Talented. (i.e., agenda, sign-in sheet, brief narrative) • Evidence or a description of former EL student monitoring of continued progress, meeting academic standards. (e.g. EL student information system reports, EL monitoring form, etc., including the date of obtaining a proficient score on the ELP assessment).
<p>IIIA-C</p>	<p style="text-align: center;">PARENT AND FAMILY ENGAGEMENT</p> <ul style="list-style-type: none"> • A school that receives funds under this part shall provide to each individual parent of a child who is a student in such school, with respect to such student information on the level of achievement and academic growth of the student. [ESSA, Section 1112(e)(1)(B)(i)] • The LEA ensures that it implements effective means of outreach 	<ul style="list-style-type: none"> • N/A District did not have any students identified as English Learners in SY being monitored. <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> • Evidence of informing the parents on the level of achievement and academic growth of their student on State approved EL assessment (ACCESS). <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> • Evidence of Parent and Family Engagement educational activities and outreach



	<p>to parents of English Learners regarding their education. [ESSA, Section 1112(e)(3)(C)] LEA shall use the funds to provide and implement other effective activities and strategies that enhance or supplement language instruction educational programs for English learners, which shall include parent, family, and community engagement activities. [ESSA, Section 3115(c)(3)(A)]</p>	
<p>IIIA-D</p>	<p style="text-align: center;">EVALUATIONS</p> <ul style="list-style-type: none"> • Language Proficiency (ELP) using the state approved English Language Proficiency assessment (WIDA) aligned to the state’s English Language Proficiency standards and the State’s academic content standards. [ESSA, Section 1111(b)(2)(G)]; [ESSA, Section 3113(b)(3)(B)] • The LEA assesses all qualified ELs on annual academic achievement assessments in appropriate grades. [ESSA, Section 1111(b)(2)(B)(vii)(III); 1111(b)(3)] <p>The State monitors test administration in its districts and schools to ensure that appropriate assessments, with or without accommodations, are selected for all students with disabilities and ELs so that they are appropriately included in assessments and receive accommodations that are [...] consistent with the assessment accommodations identified by a student’s IEP Team under IDEA, placement team convened under Section 504; or for students covered by Title II of the ADA.[cf. ESSA, Section 1111(b)(2)(G); 34 CFR 200.6(h)(1), (5)]</p>	<ul style="list-style-type: none"> • N/A District did not have any students identified as English Learners in SY being monitored. <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> • No submission required <ul style="list-style-type: none"> ○ OPI will pull WIDA ACCESS data to determine completeness of test administration
<p>IIIA-E</p>	<p style="text-align: center;">TITLE III GRANT RECIPIENTS ONLY – PD</p> <p>LEAs must use Title III funds to provide effective professional development for teachers and principals of ELs that is:</p> <ul style="list-style-type: none"> ○ Designed to improve the instruction and assessment of ELs; Designed to enhance the ability of teachers and principals to understand and implement curricula, assessment measures and practices, and instructional strategies for ELs; ○ Effective in increasing children’s English language proficiency or substantially increasing the subject matter knowledge, teaching knowledge, and teaching skills of teachers of ELs; and <p>Of sufficient intensity and duration to have a positive and lasting impact on the teachers’ performance in the classroom. This does not include one-day or short-term events, unless as part of a teacher’s comprehensive professional development plan that is based on a needs assessment. [ESSA, Section 3115(c)(2)]</p>	<ul style="list-style-type: none"> • N/A District was not a Title III Grant Recipient <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> • Evidence of EL professional development (PD) for teachers and principals (e.g., agendas and sign-in sheets, provider invoices, training descriptions, etc.). <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> • Evidence of EL professional development (PD) for personnel working in participating non-public schools (if applicable). • Evidence of EL professional development (PD) for personnel working in facilities for neglected and/or delinquent children (if applicable).



<p>IIIA-F</p>	<p>TITLE III AND EMERGENCY IMMIGRANT GRANT RECIPIENTS ONLY – PARENT AND FAMILY ENGAGEMENT</p> <ul style="list-style-type: none"> • An eligible entity receiving funds under section 3114(d)(1) shall use the funds to pay for activities that provide enhanced instructional opportunities for English Learner and immigrant children and youth, which may include family literacy, parent and family outreach, and training activities designed to assist parents and families to become active participants in the education of their children. [ESSA, Section 3115(e)(1)(A)] • An eligible entity receiving funds under section 3114(d)(1) shall use the funds to pay for activities that provide enhanced instructional opportunities for immigrant children and youth, which may include family activities, coordinated with community-based organizations, institutions of higher education, private sector entities, or other entities with expertise in working with immigrants, to assist parents and families of immigrant children and youth by offering comprehensive community service [ESSA, Section 3115(e)(1)(G)] 	<ul style="list-style-type: none"> • N/A District was not a Title III or an Emergency Immigrant Grant Recipient OR • Evidence of Parent and Family Engagement educational activities for parents of English Learner and immigrant students (PowerPoints, handouts, etc.) • Evidence of outreach invitations and activities coordinated between the LEA and community-based organizations to assist parents of immigrant children (e.g., agendas, flyers, emails).
<p>IIIA-G</p>	<p>EMERGENCY IMMIGRANT GRANT RECIPIENTS ONLY</p> <ul style="list-style-type: none"> • The LEA uses Immigrant funds to serve immigrant children and youth as required by Section 3115(e) • The term “immigrant children and youth” as defined in section 3201(5) of Elementary and Secondary Education Act (ESEA), means individuals who- <ol style="list-style-type: none"> 1. Are aged 3 through 21; 2. Were not born in any State; and 3. Have not been attending one or more schools in any one or more States for more than 3 full academic years. <p>*An immigrant student may or may not also be EL, and an EL student may or may not also be immigrant.</p>	<ul style="list-style-type: none"> • N/A District was not an Emergency Immigrant Grant Recipient OR • Sample of documentation (e.g., flyers, newsletter announcements, agendas, sign-in sheets, etc. for FY22 or FY23) that indicates the use of funds to enhance instructional opportunities for immigrant children and youth (if applicable). [ESSA, Section 3115(e)(1)(A)-(G)]



Title IV, Part A – Student Success and Academic Enrichment Grants

The purpose of Title IV-A is to improve student academic achievement through 1) access to a well-rounded education, 2) improved school conditions regarding the health and safety of students, and 3) improved use of technology in order to improve the digital literacy of all students. The focus of Title IV-A monitoring is on the district’s coordination and collaboration with its community as well as the implementation and evaluation of program strategies.

If you have questions please contact Richard Hanley, Title IV Program Specialist, Richard.Hanley@mt.gov, 406-444-3519.

LEA:		DATE SUBMITTED:	BY:
OPI REVIEWER:		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: <i>Title I-A (Targeted or Schoolwide) or Title II-A</i> , 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	
Comprehensive Needs Assessment			
IVA-CNA	Sec. 4106 (d) Comprehensive Needs Assessment E-grants Description: 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) *REQUIRED FOR ALL DISTRICTS WHO RECEIVE AN ALLOCATION OVER \$30,000.	Please provide at least one of the following: i. US Dept of Education Title IV-A Needs Assessment Tool ii. Montana Comprehensive Needs Assessment Summary Report iii. Locally determined Needs Assessment Tool or Process iv. Other supporting documents for comprehensive needs assessment process: Meeting agenda/minutes, supporting data or evidence, parent survey, etc.	
Districts Running a Title IV-A Program			
Programmatic Reporting			
IVA-1	Sec. 4106 (e)(1)(E) and (e)(2)(F) Annual Programmatic and Fiscal Reporting End of the Year Reporting and Title IV-A Final Expenditure Report or Program Report (Both in E-grants)	On the online form, check the box to confirm you have completed the following: End of the Year Reporting- Completed in ESEA Consolidated Application <ul style="list-style-type: none"> Describe the programs and activities conducted with these funds in the previous school year. What measures were in place to evaluate the effectiveness of the Title IV-A programs? 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 	



	<p>**REQUIRED FOR ALL DISTRICTS WHO RAN A TITLE IV-A PROGRAM</p>	<p>under this program in the future.</p> <p>Title IV-A Final Expenditure Report or Program Report (Expenditures)- Completed in E-grants</p> <ul style="list-style-type: none"> 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.
<p>IVA-2</p>	<p>Sec. 4106 (c) Evidence of Consultation Stakeholders were consulted in the development and implementation of the district’s Title IV-A plan and periodic meetings are scheduled.</p> <p>**REQUIRED FOR ALL DISTRICTS WHO RAN A TITLE IV-A PROGRAM</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>
<p>IVA-3</p>	<p>Sec. 4106 (e)(1)(A), 4107(a)(1), 4107(a)(2), 4108 (a)(1), 4108(a)(3), 4108(a)(4) Program Coordination and Partnerships Activities under Title IV-A are coordinated with other schools and community-based services and programs and may be conducted 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>**REQUIRED FOR ALL DISTRICTS WHO RAN A TITLE IV-A PROGRAM</p>	<p>Examples of documentation:</p> <ul style="list-style-type: none"> Description of coordination between school and/or community services and programs. Documentation of work with community partners. Description of how your programs and activities to support Safe and Healthy students promote the involvement of parents.
<p>IVA-4</p>	<p>Sec. 4001 (a)(1) Mental Health Documents (if applicable) 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"> Mental health services program and assessment details. Written notice for parents describing mental-health services or assessments and informed written consent documents for students who received mental-health assessments or services.



<p>IVA-5</p>	<p>Private School Participation (if applicable) in Title IV-A Programs 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"> • Documentation of private school stakeholder input and consultation in a timely manner. • Private schools' Title IV-A Service plan • Private school program evaluation for previous school year. • Documentation of Private school complaint procedure and any related communications. • Any additional fiscal documentation not included under Fiscal Requirement #6f Private School Expenditure (below).
<p>Fiscal Reporting</p>		
<p>IVA-6</p>	<p>Program Expenditures (Allocations under \$30,000) **REQUIRED FOR ALL DISTRICTS WHO RAN A TITLE IV-A PROGRAM</p>	<p>LEAs receiving LESS than \$30,000: Upload documentation that verifies the following:</p> <ol style="list-style-type: none"> Expenditures are being maintained by the LEA for Title IV-A. Expenditures are for allowable and approved activities. Expenditures supplement and do not supplant state and local funds. Documentation that shows program expenses tracked by expenditure category. 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. Evidence of equitable services expenditure for private school share (if applicable).
<p>IVA-6</p>	<p>Program Expenditures (Allocations \$30,000 or more) **REQUIRED FOR ALL DISTRICTS WHO RAN A TITLE IV-A PROGRAM</p>	<p>LEAs receiving \$30,000 or GREATER: Upload documentation that verifies the following:</p> <ol style="list-style-type: none"> Expenditures are being maintained by the LEA for Title IV-A. Expenditures are for allowable and approved activities. Expenditures supplement and do not supplant state and local funds. Documentation that shows program expenses tracked by expenditure category: <ul style="list-style-type: none"> • Breakdown indicates not less than 20 percent of SSAE funds received was used for Well-Rounded Education programs and activities (4107). • Breakdown indicates LEA used not less than 20 percent of SSAE funds received for Safe & Healthy Students programs and activities (4108). • Breakdown indicates LEA used not less than 1 percent of SSAE funds received for Effective Use of Technology programs and activities (4109). 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. Evidence of equitable services expenditure for private school share (if applicable).
<p>IVA-7</p>	<p>Distribution of Funds, Sec. 4106 (e)(2)(A) **REQUIRED FOR ALL DISTRICTS WHO RAN A TITLE IV-A PROGRAM</p>	<p>Upload documentation or a written summary to address:</p> <ul style="list-style-type: none"> • Are Title IV-A programs offered district-wide or provided to specific schools? • If programs were provided only to specific schools, what criteria was used to determine which schools will receive the funds? • How are the funds being used for schools identified for comprehensive and targeted support? • 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?
IVA-8	<p>Title IV-A Equipment Inventory and Labeling LEA has a current inventory of any materials purchased with Title IV-A funds.</p> <p>**REQUIRED FOR ALL DISTRICTS WHO RAN A TITLE IV-A PROGRAM IF 600-SUPPLIES or 700-Property and Equipment was purchased.</p>	<p>Upload the following documentation:</p> <ul style="list-style-type: none"> • LEA fixed assets inventory. This includes laptops, computers, Smartboards, projectors, etc. • LEA retains control of and includes an inventory of fixed assets for all equipment purchased with funds for private schools (if applicable).
IVA-9	<p>Documentation of Title IV-A Employee Time 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) **REQUIRED FOR ALL DISTRICTS WHO RAN A TITLE IV-A PROGRAM IF Salaries/Benefits were expended.</p>	<p>Upload the following documentation:</p> <ul style="list-style-type: none"> • Employee time records: timesheets, job description, board minutes approving position. • Services provided to private school children were provided by employees of the LEA or under contract with the LEA (if applicable)
IVA-10	<p>Internet Safety Policy and Informed Consent Form, Sec. 4121(a) and 4121(b)(2)A</p> <p>**Required for all districts that use Title IV-A funds to purchase devices or other direct costs associated with accessing the internet.</p>	<ul style="list-style-type: none"> • 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. • Copy of Informed Consent Form for Student Use of the Internet



Title IX - Education for Homeless Children and Youths *(Required for all districts)*

The purpose of the McKinney-Vento program is to remove barriers and support the success of students experiencing housing instability by addressing the challenges children and youth face enrolling, attending and succeeding in school. *Updated 5/2026*

If you have questions regarding this section please contact Justine Guthrie, Homeless Education Coordinator, Justine.Guthrie@mt.gov, 406-410-4098

Indicator #	Indicator	Evidence to Maintain Annually
MV-A	<p>The LEA has reviewed and revised policies and procedures that could act as barriers to the enrollment, attendance, and success of homeless children and youth. 42 USC, 119, VI, B, §11432 (g)(1)(I) Policies and procedures must include the following:</p> <ul style="list-style-type: none"> • Procedures to identify homeless children and youth, including the identification of unaccompanied homeless youth (UHY) • Procedures to report data to the OPI as required by the ESEA, including demographic data, testing, attendance, and graduation/drop-out • Procedures to ensure immediate enrollment without documentation, including enrollment in any school- based programs or extra-curricular activities • Procedures for assisting in obtaining necessary documents • Procedures for referring students to other services within the school/district • Procedures for referring families to other services in the community, including Head Start services for younger siblings • Handbooks and websites must include information on eligibility, contact information for the liaison, and the process for requesting assistance • Outreach materials and information are posted in the local community in locations where homeless families and youth may seek assistance. • Families and UHY must be provided with a copy of their rights, including the right to transportation. • Procedures for families or UHY to file a dispute if there is a disagreement about eligibility, school placement, or services to be provided. 	<ul style="list-style-type: none"> • OPI Homeless brochure and OPI homeless poster and any other outreach materials. • Locations where outreach materials can be found in the community. • OPI Homeless Dispute Resolution Form • Pathwise/TransACT forms HS-02, HS-03 AND HS-04 • Copies of all school board, district, and school policies that address the identification and educational needs of homeless students, including dates of adoption. *Policies must have been adopted after October 2016, to comply with the ESSA. • A narrative explanation of how the district collects and maintains data on homeless students as required in the ESEA. • Copies of district or school enrollment documents: residency questionnaires, enrollment forms, proof of immunization forms, referral for services forms, or other documentation that provides evidence of a method to determine the housing status of students. • A narrative explanation of how the district assists homeless students in obtaining necessary documentation. • Copies of memos or documents used to inform school nutrition services and transportation services of homeless children. • Proof of collaboration with Head Start or other pre-school programs serving homeless families and children. • Copies of student handbooks which include information on McKinney-Vento and how to contact the liaison. • The URL of the school/district webpage with information for homeless families and students. • Copies of the district's dispute resolution form, or of the staff and parent handbook explaining how parents may dispute the district's decision regarding the determination and placement of a



		<p>homeless child (prior to state level dispute).</p> <ul style="list-style-type: none"> • Copies of materials provided to families that include the rights of homeless students.
<p>MV-B</p>	<p>The LEA has designated a homeless liaison who has the capacity to perform all duties as required. §11432 (g)(6) Such duties include:</p> <ul style="list-style-type: none"> • Annual participation in three hours of professional development on topics related to family or child homelessness (Seven hours for subgrant liaisons.) • Training for ALL school personnel and local agencies serving low-income families and children regarding the rights of homeless children and youth • Coordination and collaboration with other school-based programs, such as Title I, IDEA, EL, migrant, and Indian Education • Coordination with CTE teachers, athletic coaches, fine arts teachers, or other staff supporting school sponsored enrichment activities • Coordination and collaboration with other local homeless liaisons and the state homeless coordinator • Collaboration with local agencies providing shelter, food, health care, or other services to homeless families and children <p>Name of liaison, listed duties, and evidence of participation in professional development that addresses the specific needs of children and families at risk of, or experiencing, homelessness.</p>	<ul style="list-style-type: none"> • Pathwise/TransACT form HS-08 • Evidence all staff have been trained on McKinney-Vent (Copies of agendas from staff meetings, trainings, or professional development). • Copies of emails or communication between the homeless liaison and staff who coordinate activities for other programs within the building that are providing services to homeless students. • Copies of emails or communication between the homeless liaison and staff who support CTE, Fine Arts, Athletics, or other school sponsored enrichment activities that homeless students are participating in. • Copies of emails or communication between the homeless liaison and other local liaisons regarding transportation, student transfers, area resources, or other regional issues affecting homeless families and students. • Copies of emails, newsletters, or other communication between the homeless liaison and the state coordinator regarding homeless students, issues, or program questions. • Copies of emails, meeting agendas, or other evidence that the homeless liaison communicates and collaborates with local shelters, food banks, or other organizations providing services to homeless families and children. • District must supply evidence of liaison professional development which could include renewal units, college credits, certificates of completion, or evidence of attendance at a conference.
<p>MV-C</p>	<p>The district and local liaison have designed a high-quality program focused on providing homeless children and youth with access to all services and supports needed to ensure their academic success.</p> <p>Such services and supports must include:</p> <ul style="list-style-type: none"> • School meals • Transportation • Title I support, including support for students enrolled in non-Title I schools • Support for parents and families of homeless children and youth to participate in family engagement activities or other school events 	<ul style="list-style-type: none"> • Pathwise/TransACT form HS-10 • Copies of the overall Title I plan that includes a method for identifying and serving homeless children, including services to homeless children enrolled in non-Title I schools (if applicable). • Documentation of parent and family engagement in educational activities, including meeting agendas, letters, or other evidence of outreach to homeless parents and families. • An explanation of how the educational success of homeless students is supported by other programs. <p>The following is optional for K-8 schools but required for secondary schools:</p>



	<ul style="list-style-type: none"> • Participation in other federally funded programs such as IDEA, EL, migrant, Indian Education, and 21st Century. • Participation in Career and Technical Education programs and student organizations <p>School counseling programs which assist in applying for college, completing the FAFSA and other financial aid applications, and other planning and preparation for post- secondary opportunities including vocational schools and the military.</p>	<ul style="list-style-type: none"> • An explanation of how CTE teachers work with school counselors and other staff to recruit homeless students into CTE programs and student organizations. Include an explanation of any financial or material support for homeless students participating in CTE. • Evidence that the school counselor(s) has received training in how to assist homeless students in completing the FAFSA. • Agendas or flyers that include information on specialized meetings regarding college preparation for students experiencing homelessness or how to support their parents and families.
<p>MV-D</p>	<p>The LEA must provide detailed information on how Title I, Part A funds set aside for the use of the homeless program were expended, including the names of personnel paid, professional development, or a description of the supplies purchased.</p> <p>Describe the process used by the district to evaluate program effectiveness, including graduation rates, state or local standardized test scores, and attendance data of homeless students.</p> <p>§11432(G)(1)</p>	<ul style="list-style-type: none"> • Provide detailed financial information regarding the expenditure of Title I set-aside funds. • Show the data used to determine program effectiveness. Explain how the data is used to inform the evaluation process and any changes that have been, or will be made, based on this data. • Note: MV Subgrantees will describe program evaluation efforts in the section below.
<p>MV-E</p>	<p>This section is required for McKinney-Vento Subgrantees Only.</p> <p>Describe progress and dates of McKinney-Vento Authorized Activities as specified in your McKinney-Vento Sub-grant application. Explain the process used by the district to evaluate program effectiveness, including graduation rates, state or local standardized test scores, and attendance data of homeless students.</p> <p>§11432(G)(1)</p>	<ul style="list-style-type: none"> • Provide a summary of all activities including timelines and expenditures, as outlined in the LEA's current McKinney-Vento application. • Copies of action plans, call logs, or other case management notes may be submitted. • All names and identifying information should be removed per FERPA. • Show data used to determine program effectiveness. Explain how the data is used to inform the evaluation process and any changes that have been, or will be made, based on this data.