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***GUIDE TO***

***ON-SITE SUMMER MONITORING***

***TITLE I-C***

**Revised January 2023**

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**THE MONITORING PROCESS**

Monitoring districts’ implementation of state and federal regulations that guide services for migrant student learners provides the ODE with an opportunity to examine how districts have instituted policies, systems, and procedures to ensure district/school compliance with those statutes and regulations.

Monitoring serves many purposes:

* Formalizes the shared responsibility of the ODE and the districts to improve student achievement and close the achievement gap in order to have all students reach proficiency.
* Provides a vehicle to the ODE’s legal responsibility to monitor the implementation of state and federal funds related to programs serving migrant learners.
* Leverages support for broad scale implementation in all districts that receive these funds.
* Ensures that school districts provide critical information to parents that enable them to be full partners in their children’s education.
* Provides data that inform technical assistance that supports school districts’ efforts to improve teaching and learning.
* Provides data to inform ODE policy and state leadership activities.

### ODE’s monitoring plan involves both the review of documentation prior to the on-site visit and on-site reviews that help districts build capacity to improve student achievement and ensure program compliance. During the pre-site review, ODE staff will collect data that speaks to the monitoring indicators to determine compliance.

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### Monitoring Team

The number of reviewers in each team varies and depends on the size of the district. The Migrant Specialist is generally designated as the team leader. Usually, just the ODE Migrant Specialist is the only reviewer.

### The Team Leader

The Migrant Specialist:

* Communicates directly with the designated local team leader about the review process.
* Develops a visitation schedule.
* May convene team members to review documents prior to the initial interview.
* Convenes debrief sessions during the visit.
* Updates the local team leader on team activities during the on-site visit.
* If there is a team, a meeting may be convened of team members for the writing of the preliminary report.
* Leads the exit conference.
* Passes on findings and follows up on corrective action steps.

### Description of the Monitoring Process

As the monitoring process is a ‘snapshot’ of district implementation, approval of corrective actions required as a result of a monitoring activity are specific to compliance issues cited in monitoring reports, but do not address emerging issues. Monitoring outside of the scheduled cycle may be arranged as needed if a district has serious or chronic compliance problems, or has unresolved issues identified during information shared or monitoring visit.

* 1. **Prior to the On-Site Visit**

Prior to the monitoring visit, ODE staff will request that the district submit specific documentation prior to the scheduled on-site visit.

* **Self-Assessments**

The ODE Teaching, Learning, and Assessment team provides these forms to districts serving migrant students. These forms include a set of questions intended to be used as part of the districts’ self-assessment process.

#### The regional responses to these questions will provide the monitor lead with critical initial information about programs for migrant students from several perspectives: Administrative, fiscal, program evaluation, recruitment; migrant data, and school-level review.

Once the Self-Assessments are reviewed, the Monitoring Committee will have an Entrance Meeting. At the Entrance Meeting, ODE and your regional staff will discuss your regional’s responses to the self-assessments. The purpose of this conversation is to learn more about your region’s Title I-C services and answer any questions your team might have. ODE staff will make sure that your regional staff have access to all tools and templates to support submission of documentation.

#### Documentation Submissions

The following are documents that your region needs to upload in OneDrive for the ODE visiting team members to review prior to the on-site visit:

1. [Summer Program Monitoring Tool](https://www.oregon.gov/ode/schools-and-districts/grants/ESEA/Migrant/Documents/2%20Summer%20School%20Monitoring%20Tool%202020.docx). This tool lists the following program documents:

|  |
| --- |
| *District Planning* |
| *Priority for Service Students* |
| *Title IC services* |
| *Parent Involvement* |
| *Title IC Staff* |
| *Identification and recruitment* |

Program documents are reviewed with the checklist included on the monitoring tool. Notes are helpful if the evidence sent by the district is not clearly supporting the questions on the monitoring tool.

In addition to the Monitoring Tool, the following is required:

1. [Summer MEP staff](https://www.oregon.gov/ode/schools-and-districts/grants/ESEA/Migrant/Documents/5%20Summer%20School%20MEP%20Staff%202020.xlsx)
2. Migrant Inventory List
3. Expense Report

Templates are accessible on our [Title I-C website](https://www.oregon.gov/ode/schools-and-districts/grants/ESEA/Migrant/Pages/Monitoring.aspx). Your region will upload the required documentation via OneDrive, your access information to OneDrive is sent by ODE at least two months prior to the On-Site visit. Please email Yuliana Kenfield if you are having difficulties with OneDrive at yuliana.kenfield@ode.oregon.gov

* **Latest Title I-C sub-grant application.** This documentation does not need to be uploaded by your region as ODE has a copy handy.

In sum, this set of documentation provides background, context, and evidence for compliance. A thorough analysis of relevant documents is crucial to conducting an effective and efficient monitoring review. Analysis of documents helps monitoring members identify important issues and develop questions before the visit, ensuring focused and productive on-site interviews.

* 1. **On-site Monitoring**

During the site visit, ODE staff will interview district and regional staff, MEP summer coordinators, and students. Unlike Regular Year Onsite monitoring, parent meetings are not required. This multi-level interview strategy will allow the monitors to gather information from a variety of perspectives and better evaluate the impact of the district’s administration on the implementation of the state and federal statutes at the district and school levels. This strategy will also allow the monitoring team to conduct a thorough review of the indicators, and acquire a more complete picture of the degree of program implementation across the district.

The ODE is charged with the responsibility of providing quality assistance to districts and schools serving migrant students. The on-site visitations to districts are intended to support both roles: program assistance and compliance.

#### About the visit -- The review includes gathering information about programs for migrant students from several perspectives: Administrative, fiscal, program evaluation, recruitment; migrant data, and school-level review. We also include a set of questions to be used with students.

**Administrative Review** – This portion of the visit will look at procedures that are typically the responsibility of district-level staff.

**Fiscal Review** – This review may include staff from the business office and it looks at book keeping practices for federal grants, as well as the state funding for migrant programs two years back. The expenses should clearly identify staff paid by migrant funds and what funds paid for to make sure migrant expenses meet the “necessary and reasonable” requirements.

**Program Evaluation** – Looks at how district staff collects data from district schools serving migrants, how the data is used for evaluation purposes and to report to the ODE on program activities, professional development, and progress of migrants in the academic standards.

**School-Level Review** – This section of the review is conducted at the schools serving migrant students. Reviewers collect data on the implementation of the district’s Migrant Program.

**Recruitment** – Looks at the identification and recruitment plan at the local level.

**Migrant Data** – Looks at the process of updating COE information in the Oregon Migrant Student Information System (OMSIS) and the Migrant Student Information eXchange (MSIX).

This visit ends with an exit conference. The Exit Conference is held at the conclusion of the on-site visit for the purpose of reporting the preliminary results of the monitoring visit to staff from the district. Typically, the Migrant Title I-C Specialist (and possibly a contractor) meets with officials from the district to discuss potential findings and recommendations that the team will cite in the monitoring report. The team will summarize the week’s activities, the findings, commendations, and recommendations. The team also responds to questions posed by the district (both related to process and content). The Migrant Specialist emphasizes that the information presented at the exit conference is the information that will be included in a formal written report to be sent to the district’s superintendent within 30 working days after the exit conference.

* 1. **After the On-site visit**

A formal written communication will be sent to the district’s superintendent within 30 working days after the exit conference. Thus, your region receives either a letter of compliance or a copy of the report outlining the additional evidence needed to demonstrate compliance.

**SETTING UP THE VISIT**

1. Email communication is sent to the Title I-C Director by Migrant Ed ODE.
	1. Date of visit
	2. Team leader
	3. Requests a district contact
2. Set up phone conversation with district contact:
	1. Go over the process from initial interview to exit conference.
	2. Explain how schools/sites are chosen: school with the most number of migrants, or provide specific program for migrants students.
	3. The superintendent and or the regional director choose who attends the initial interview and exit conference.

e. Explain about student interviews:

1. one meeting to include between 6-8 students at the same time;
2. school staff may be present during the student interviews as long as it doesn’t affect the answers of the students;
3. principal selects the students:
* a private room needs to be reserved for this interview.

f. Team leader sends the schedule to district contact for review.

g. Exit conference – oral report which has the reports for each program are in three sections:

1. Finding: Describes issues of compliance that will require response and correction by the district in order to continue to be eligible for MEP funding. Each finding is accompanied by a description of the required action and timeline.
2. Recommendation: Lists observations and practices for the district’s consideration as it reviews and revises programs.
3. Commendation: Describes observations of exemplary practices by the district.

h. Written report sent to superintendent within 30 days of exit conference.

**Questions and Answers on Visits**

**How are districts selected for on-site visitations?**

Factors that influence when districts/ESDs will be visited follow a rubric of risk factor document that includes:

1. A monitoring visit every three years.
2. Concerns from MEP staff or parents.
3. Findings from last monitoring visit.
4. New director or leadership to the migrant program.
5. Quality of most recent ESEA Subgrant Application.
6. Requests for program evaluation.
7. Sudden and significant changes in personnel with responsibilities for implementing State and Federal statutes around services for migrant students.

**How should the district prepare for a visit?**

Review and use the Self-Assessment and On-Site Review check sheets posted on the ODE website [Title I-C Migrant Education - Monitoring](https://www.oregon.gov/ode/schools-and-districts/grants/ESEA/Migrant/Pages/Monitoring.aspx). Many districts set up permanent files using these check sheet questions and establish a process of ongoing maintenance. Beyond this basic preparation, the district will be given an opportunity to work with the visitation team leader to design the visit to meet the district’s specific program questions and needs.

**Is there a written report of the visit and what does it include?**

Yes. Within 30 days of the visit, the district will receive a written report. The report generally includes an overview of the district program for migrant students, as well as program specific reports. The reports are organized into overviews, findings (non-compliance issues that must be resolved), recommendations, and commendations. While not binding, recommendations often address those issues and ideas the team suggests to improve program quality.

**What does a typical on-site program review look like?**

Reviews are typically two to four days, although they may be longer for larger districts or ESDs with multiple districts. The reviews often begin with a meeting of the district migrant coordinator and other administrative staff. This meeting is to address program issues and to answer specific questions by the district. Following the opening meeting, key migrant staff are interviewed. The remainder of the visit is spent visiting schools to confirm and support the district’s written descriptions and plans. The visit ends with an exit conference, usually with program coordinator and the superintendent, or superintendent’s representative. The exit conference is an informal review of the findings, recommendations, and commendations emerging from the visit.

**What happens if there is a finding of non-compliance of the Migrant program being reviewed?**

It is not the purpose of the visit to impose penalties on the district for non-compliance issues. Rather, it is ODE’s goal to ensure the district is compliant with the laws and regulations by providing assistance in resolving any non-compliance issues. Once a finding is described, the team leader will work with the district to develop strategies and timelines for resolving the issues.

**Are there program areas that are of particular interest to the review team?**

Although the team will do a general review of all aspects of the district’s migrant program, several key issues are identified for more in-depth review. This part of the review is more focused on program quality and assistance than on compliance. The initial visits will focus on these areas:

1. District Migrant Program - planning, implementation, and updating;
2. Program or strategies to improve migrant students through the four Service Delivery Plan Goals;
3. Program strategies for ensuring highly qualified staff in migrant programs;
4. Program strategies for ensuring parental and community participation in programs for migrants;
5. Processes to collect data needed to include in report to the ODE on program activities, progress of migrants, and meeting the state academic standards.

**Is there anything else the district needs to know to prepare for a visitation?**

Because visits are designed to meet not only the needs of the visitation team, but also the district. Each district should feel free to suggest specific modification or additions to the visit that will assist it in developing high quality migrant programs in the larger context of school improvement.

**SETTING UP THE VISITATION SCHEDULE**

**Description of Schedule Process**

* 1. Schools are ranked from greatest number of migrant students to least number of migrant students.
1. Number of eligible schools is divided by number of slots available. Number of slots depends on number of team members and number of days allowed for visit.
2. Allow approximately 2 hours per school visit.
3. Unlike the Regular Year monitoring, Summer onsite monitoring does not include parent meeting.
4. Schedule initial interview first hour available on the first day (8:00 AM).
5. Schedule exit conferences after all schools have been visited.
6. Schedule is sent to district contact. Reach agreement on schedule. Allow for some flexibility if requested by district – staff attending conferences or trainings, field trips, vacations, etc.
7. With the proposed schedule, a template for the school schedule is included. See below.

**Summer Schedule Template**

Date \_\_\_\_\_\_\_\_\_\_\_ MEP Region\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |
| --- | --- | --- | --- |
| **Time** | **Activity** | **Location and Address** | **Names and Titles** |
| 8:00-9:00 AM | Introductory Meeting with Migrant director to review Summer School monitoring tool and evidence. |   |   |
| 9:00-10:00 AM | Meeting with Building Principal. Review Summer School questions sent in. View the assessment data being used. |   |   |
| 10:00-10:30 AM | Meet with recruiter(s)/Data specialist(s) and MEP coordinator. |   |   |
| 10:30-11:30 AM | Interview students |   |   |
| 11:30-12:15 PM | Visit Classrooms |   |   |
| **If there is another site, duplicate Principal/site Coordinator, Students, and Classroom visits.** |
|   | Exit Interview the day after all site visits were completed. |   |   |
|  |  |  |  |

**INITIAL INTERVIEW**

**Introductions**

1. District staff usually convenes the meeting and introduces attending district staff.
2. Team lead introduces the visiting team members.

**Purpose of Visit**

State the purposes of the initial interview:

* 1. To go over the monitoring process.
	2. Talk about the report having three parts: findings, recommendations, and commendations.
	3. Respond to questions about the process.
	4. To learn from the district perspective how services to migrant students are provided across the district’s schools.
	5. To learn about the implementation of Title I-C – successes and challenges
	6. To collect information from different perspectives: district, school, students, and parents.
	7. Debrief with summer site coordinators and migrant director at the end of the school visit.
	8. Migrant director is kept informed of possible findings throughout the visit.
	9. If findings may be resolved during the visit, they do not become part of the report.
	10. Includes only patterns found across the district schools.
	11. If a serious enough incident is found and is isolated, it is reported to the school principal and it is not part of the report.
	12. Update and share changes of the Title IC, Migrant program at the state level.

**Suggested Discussion Points**

District demographics.

Services to Migrants – success and challenges in meeting Measurable Program Goals.

Assurance of Priority for Service students having priority to Title I-C services.

*Note*: Regional Migrant program director sometimes has a presentation ready.

**SCHOOL VISITS**

**Summer Site Director interview**:

Summer Site Director may invite other staff for this interview.

Note that Summer Site Director should respond to questions and send to ODE a week before the visit. See list of questions in the Self-Assessment questionnaire for the Site Directors. During the site visit those questions might guide the interview. Some of those questions include the following:

1. How are you involved with the development of the Summer School Plan?
2. Were you involved with the selection of staff? Is all staff highly qualified?
3. What are the “goals” for summer school?

**Student interview**

This form is completed by ODE Migrant Specialist during the interview. The set of questions during the interview will include the following:

* 1. What classes do you have at summer school? What is your favorite and why?
	2. Tell one thing you really like about this migrant summer program.
	3. Pretend your Principal is asking for suggestions on one thing that should be changed at this school. What would you like to see changed?
	4. How many of you are you planning to graduate from high school? What career/job would you like to engage in?
	5. **High School:** Are you on track to graduate? How do you know?

**Debrief with Summer Site Director**

Highlight information shared by students. Ask if there any questions before leaving the school.

**INTERVIEW WITH TITLE 1-C DIRECTOR**

* This interview is primarily to go over the checklist used to evaluate the documents. Documents sent for review are returned to the district at this time.
* Share what has been found at the schools visited thus far – possible findings are important to report. Ask the director if she/he anticipated the findings.
* See areas of technical assistance that ODE can provide.
* Make sure to obtain any needed fiscal information requested on the monitoring tools. Review missing information or clarification of documentation in the District/ESD Monitoring Tool.
* Ask if there is anything they want to say about the program that was not covered by the documentation.
* Review the goals of the MEP from the Service Delivery Plan and implementation at the local level.

**If in a consortium, what is the information flow between the LEA and districts and schools?**

* A survey will need to be done with districts in the consortium.

Do you have any questions for me?

**EXIT INTERVIEW**

* 1. Gratitude expressed to district and MEP staff.
1. Superintendent receives the written copy from the Director of Multilingual and Migrant Education within 30 days of exit interview.
2. It is strongly recommended the district starts working on the resolution of any findings as soon as possible, rather than wait for the written report.

Exit Conference Introduction

The Title I-C monitoring team acknowledges that we have been in the district for a very brief period of time. During that time, the monitoring team, on behalf of the ODE, conducted a Title I-C program review to gain information about the implementation of the provisions of the ESEA, Title I-C. The review had two main purposes:

1. To ensure that the district was in compliance with the law and regulations of ESEA;
2. To provide an opportunity for the district and the ODE team to review current programs supplemented by ESEA funds.

Another purpose of this review was to assess not only the implementation of the individual programs, but also to examine the coordination and collaboration between ESEA programs and between federal programs and the district’s state funded education programs. ESEA requires the coordination of all programs designed to assist with improving academic achievement with a special emphasis on schools identified for AYP school improvement.

The report has six sections:

1. General Program Overview: Briefly describes how each program supplements program related activities.
2. Finding: Describes issues of compliance that will require response and correction by the district in order to continue to be eligible for NCLB funding. Each finding is accompanied by a description of the required action and timeline.
3. Citation: Provides the text from federal or state law that addresses each finding.
4. Recommendation: Lists observations and practices for the district’s consideration as it reviews and revises programs.
5. Commendation: Describes observations of exemplary practices by the district.
6. Review Checklists: Located at the end of the report, these provide additional information and comments.

ODE will send the Migrant Director a short survey regarding the monitoring visit to complete after the visit.