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ABSTRACT

The continuous flow monitoring system is designed to provide data on migrant education at the time it is being created to the person who most needs that information. The basic assumption underlying this system is that the operation to be monitored is continuous or cyclic with interrelated events known in advance or predictable. By identifying critical events and monitoring them, the system evaluates the overall endeavor. Most monitoring tasks are done by the area directors, regional consultants from the Migrant Education Services Center perform a few tasks, and the State Coordinator takes care of one. The system is displayed by a basic frame showing how the student and his records flow through the system and an administrative frame covering the proposal planning and implementation cycle. General and specific monitoring questions on each of the two frames help ascertain program progress. Answers to the specific questions are taken from 21 task sheets. Task sheets and their accompanying report forms describe the task, who should do it, when it should be done, its disposition, and what actions may result. The 13 tasks in the basic frame cover checks on recruiting, certificates of eligibility, and Migrant Student Record Transfer System (MSRTS) records, and services and evaluation checks. The eight administrative frame task sheets examine proposals, hiring, budget, staff, utilization, interagency cooperation, and parent involvement. (DS)

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Title I-M, ESEA
Oregon Migrant Education Program

MONITORING SYSTEM

Prepared by:
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Northwest Regional Educational Laboratory

For and In Cooperation With:
Migrant Education Service Center Staff, Area Directors, and State Coordinator

September 1, 1978

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PREFACE

This monitoring manual represents an intensive nine month cooperative development effort. The system which has resulted will allow us to better manage our efforts to help migrant children in schools throughout the State.

The approach used in this system represents a departure from our past methods of monitoring. It has a high degree of flexibility and can be modified as circumstances change.

Implementation will begin in September of this year, 1978. This present manual supersedes all previously distributed draft versions.

Suggestions and questions regarding the procedures in this manual may be addressed directly to me at the Oregon State Department of Education or to Dr. William G. Savard at the Northwest Regional Educational Laboratory.

Jose D. Garcia
State Coordinator, Migrant Education
September 1, 1978

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The success of this Project has been due to the cooperative assistance of many persons. Jose D. Garcia, Oregon State Coordinator of Migrant Education, was first to recognize the need for a basic change in the approach to monitoring migrant education operations in Oregon. Of the staff of the Migrant Education Service Center, Francisco Loera, Supervisor, Alfredo Lugo, Elton Minkler, and Ramon Gonazlez were especially helpful in formulating the monitoring questions. All of the area Project staff throughout the state were helpful but the following deserve special mention for their extra efforts: Jim Carnes of Hood River; Danny Santos, Jackson County; Pat Turner, Klamath County; Larry Larsen, Malheur; John Little and Tina Garcia, Marion County; Bill Ousterhout, Polk County and Bob Berg and Judy Weber, of Yamhill County.

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A Monitoring System for Migrant Education (Title I-M, ESEA) Programs in Oregon

Introduction:

Migrant Education programs are, by their very nature, dispersed over wide areas and are intended to have a substantial amount of local control. The local administrators may be full or part-time and may or may not be paid with I-M funds. Frequently these administrators have several other programs under their direction. Usually the staffing for these programs consists of temporary hires and shifting concentrations of migrant students frequently results in the need to hire new staff for short periods of time. All of these factors increase the difficulty of administering migrant education programs.

In order to alleviate some of these inherent administrative problems and at the same time provide better overall state-wide control and technical assistance, the Oregon State Coordinator of Migrant Education, Jose D. Garcia, raised the possibility of providing monitoring training to local administrators (Area Directors) and the personnel of the Migrant Education Service Center, which acts as a staff arm to the State Coordinator's office. Accordingly, a three day workshop on general monitoring techniques was prepared and presented on January 11-13, 1978 by the Audit and Evaluation Program of Northwest Regional Educational Laboratory (NWREL). The first two days were attended by the Oregon MESC staff; the third day was attended by both the MESC staff and Area Directors. The general approach to monitoring presented at the

workshop was accepted. Also, lists of monitoring questions and draft copies of sample forms were developed. However important this first step was, it did not go far enough to become an operational tool for the program.

This concern was expressed by the State Coordinator in a letter dated March 16, 1978. The main body of the letter was as follows:

> The monitoring workshop you presented on January 11, 12 and 13, and the sample forms you subsequently gave us were well received by the area directors and the MESC staff who were present. The problem is that we want more. We would like to start a monitoring operation this spring, if possible, and for certain in the fall. What we need is a completely developed package that could be used in the field, also some training for people in other parts of the state. Another problem is that we would need some way to finance this. Do you have any sources?
>
> Also, there may be some interest by some of the other Northwest states in this type of monitoring approach. They all seem to have similiar problems.

As a result of this request, this project was planned and funding requested under the Northwest Regional Educational Laboratory's NIE grant to provide planning assistance to states.

The general approach to monitoring proposed at the initial workshop and subsequently adopted for development into this manual is called Continuous Flow Monitoring. It differs substantially from approaches to monitoring previously used in Oregon Migrant Education and other state and federal programs.

Continuous Flow Monitoring

Continuous Flow Monitoring is the process of determining if certain conditions necessary, but not sufficient, for the success of an operating enterprise are present.

A basic assumption underlying Continuous Flow Monitoring is that the operation to be monitored is regular, continuous, or cyclic in that the interrelated events, activities, or processes are known in advance or are predictable. Furthermore, some of these events, activities, or sub-processes have been, or could be, determined to be of critical importance to the overall endeavor being considered. Thus, if we can determine that these certain critical elements are present in the quantity, quality, and at the times necessary, then we can have increased confidence in our chances of achieving success with the overall endeavor.

It is not necessary, nor would it be economically feasible, to monitor every element of a process. The general strategy is to determine in advance which elements are critical, and then to check only on those so identified.

Monitoring is not evaluation, but is related in the sense that it helps to make a program evaluatable, and generally improves program quality. Monitoring and evaluation often share data.

Since Continuous Flow Monitoring assumes a defined system it follows that if there are problems with accomplishing the monitoring or of setting up the monitoring plan there is a strong possibility that there is a more basic problem with the operating system. A corallary to this statement is that one approach to bringing about improvements to an operating system is by attempting to develop a Continuous Flow Monitoring Process for it.

page 3 deleted, material duplicated on page 4.

This forces a clarification of the operating procedures, demands an explication of the critical elements and the establishment of agreed upon time schedules and deadlines.

Continuous Flow Monitoring is not usually done by a single person. Usually several persons are involved, each collecting, interpreting, and forwarding for further interpretation the critical data he is most concerned with. Continuous Flow Monitoring is not a single person or team making a one-time site visit with a long check list of items that cover the entire program. Rather it is the periodic collecting of critical data at the times when those data are being created and hence are of greatest importance. Continuous Flow Monitoring provides the administrator with warning signals that certain limits are being approached or exceeded, or that events are not taking place, or do not appear to have a reasonable chance of taking place, in time for the administrator to do something about it. Continuous Flow Monitoring is a kind of administrative early warning system, a way of spotting a crisis before it develops.

Continuous Flow Monitoring also provides the administrator with an important side benefit. While the administrator cannot know everything that is happening in his organization the data which "trickle through his fingers" in the monitoring process will provide him with an excellent "feel" for what is going on--but only if those monitoring points are well chosen.

How Should Monitoring Be Accomplished?

The monitoring tasks described within this document provide a rationale for who, how and why the tasks are to be accomplished. Beyond these logistical points, however, the overall approach to be taken in monitoring must be considered. Monitoring should collect compliance information, but should not be punitive. Monitoring provides information which tells us how programs are progressing. This information could be either used or misused. Corrective action taken in a positive manner can improve program quality. Punitive action taken in a negative manner can actually destroy program quality. Thus, both the process of monitoring and how the resultant data is utilized can be either facilitating or damaging to the overall effort. Monitoring should be conducted in an honest, open, professional manner. Monitoring is not done to intimidate or punish, but rather to improve the quality of programs for migrant children.

The success of the total monitoring process will depend heavily upon how it is viewed in the central office and the field. It will be either (1) an administrative procedure which merely represents more paperwork to be done, (2) an audit process for removing undesirable programs and personnel, or (3) an information seeking and giving process for allocating resources to improve program quality. It is most certainly hoped that the third option will be the choice of all those persons involved in monitoring programs.

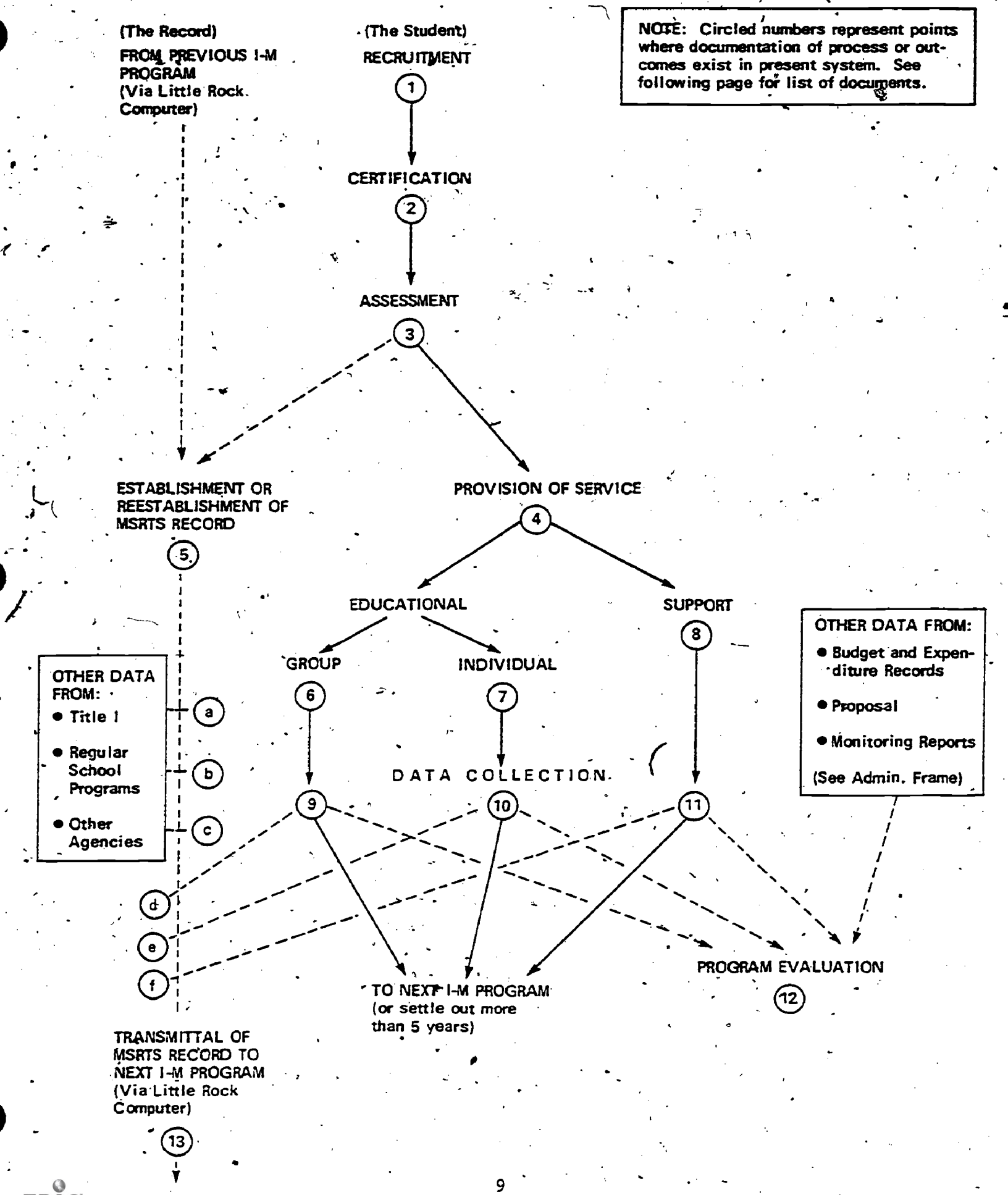
Who Is The Monitor?

Who the monitor is depends upon the task. In the system which follows most monitoring tasks are performed by the area directors, some are performed by regional consultants from the Migrant Education Service Center (MESC) and one is performed by the State Coordinator. In several cases the area director monitors certain items locally and the regional consultant from the MESC later follows up by monitoring a sample of these same items. The basic principal is that a particular monitoring task is performed by the person who most needs to know.

The Monitoring Frames

The monitoring frames are graphic representations of the Oregon Migrant Education system. Two frames are displayed on the following pages. The first is the basic frame, which shows how a student (and his accompanying record) flows through the system. The second is the administrative frame which displays the proposal planning and implementation cycle from the administrative point of view. The monitoring frames are important because they define the operating system we are concerned with and represent the agreed upon perceptions of all those persons involved. Following each monitoring frame is a list of existing documents or reports that may be of use in the Continuous Flow Monitoring process. They are numbered to correspond with points indicated on the monitoring frames.

I-M BASIC MONITORING FRAME



NOTE: Circled numbers represent points where documentation of process or outcomes exist in present system. See following page for list of documents.

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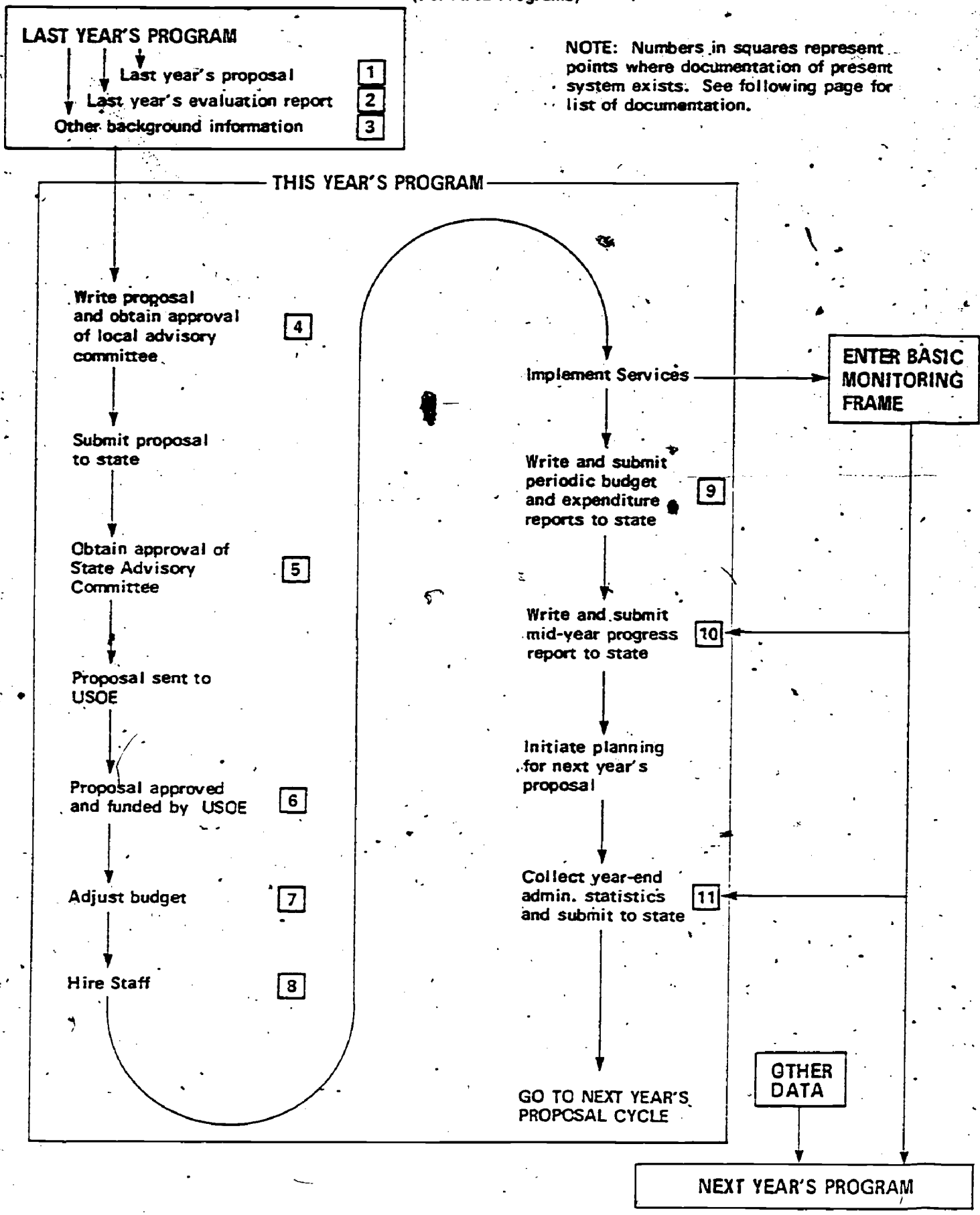
MONITORING POINTS AND AVAILABLE DOCUMENTS
(From Basic Monitoring Frame)

(1)	Home/School Counselor Logs and Monthly Reports
(2)	Certificates of Eligibility
(3)	Assessment Form
(4)	Initial Enrollment Reconciliation
(5)	.Individual MSRTS Record .MESC Monthly MSRTS Reports
(6) (7) (8)	Student Service List
(9)	Test Summary Sheets
(10)	.Individual Short-Term Plan Records and Summary .Counseling Request/Reports and Summary .Tutoring Requests/Reports and Summary .Non-Test Summary Sheets
(11)	.Home/School Counselor Monthly Reports .Annual Administrative Statistics Report
(12)	Ending Enrollment Reconciliation
(a) - (f)	Individual MSRTS Records
(13)	.Individual MSRTS Records .MESC Monthly MSRTS Report

I-M ADMINISTRATIVE MONITORING FRAME
(For Area Programs)



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MONITORING POINTS AND AVAILABLE DOCUMENTS
(From Administrative Monitoring Frame)

1	Last year's final, approved amended proposal
2	Last year's full state-wide evaluation report
3	Other data such as labor statistics and Department of Agriculture reports
4	The final draft submitted by the area
5	Letter of approval showing any changes
6	Final approved and funded proposal with changes indicated
7	Final budget agreed to by area and State
8	Reports of personnel actions taken by areas, sent to State
9	Any expenditure reports required by State
10	The required mid-year report
11	The required year-end statistics report

Monitoring Questions

The monitoring questions which relate to the basic frame follow immediately. Those which relate to the administrative frame appear later at the head of the administrative section.

It is important to understand the purpose of the monitoring questions. The list of questions is not a monitoring instrument and cannot be used as such.

The monitoring questions (both general and specific) are those questions an administrator should be able to ask of himself in order to ascertain how well his program is progressing. The general monitoring questions are numbered and cannot be answered directly. The specific questions under the general questions are lettered and they can be answered directly. Knowing the answers to the specific questions allows one to formulate the answers to the general questions. The monitoring tasks which follow in the next section are devoted to obtaining the answers to the specific questions so that the administrator can have a sound basis for formulating answers to the general questions.

The monitoring questions were formulated by the MESC staff and the area directors working together. The questions relate to the critical points in the migrant education operation. Having good answers to these questions will not guarantee an effective operation but not having good answers to these critical questions will probably guarantee a poorly operating project.

MONITORING QUESTIONS
(From the Basic Frame)

1. How well is the recruiting effort progressing?
   a. How many students have been certified in the past two weeks?
   b. What is the total number of students certified so far this year?
   c. What was the year-long total of students certified last year?
   d. Has there been a reasonable amount of recruiting activity?
   e. Have the recruiting activities been appropriate?
2. Are Certificates of Eligibility being handled properly?
   a. Are the certificates properly filled out, signed, and dated?
   b. Are the certificates on file at the school location?
   c. Has the Area Director, or his designated (other than home-school consultant) representative, approved each certificate?
3. Are the individual needs of the students for I-M services being promptly assessed?
4. Are MSRTS records being properly established for all students?
   a. Do existing MSRTS records accurately reflect what is known about the students?
   b. How many and what proportion of certified students are not having MSRTS records promptly established?
   c. How many and what proportion of certified students do not yet have MSRTS records?
5. Are adequate services being provided to the children?
   a. Are the services actually being provided those which were promised in the proposal?
   b. Have changes which have been made in services to be provided been properly documented and approved?
   c. Are the services being currently provided reasonable in view of what is now known about the needs of the students?
   d. Does the Enrollment Reconciliation sheet accurately reflect what services are being provided?
   e. Do the component descriptions match with what is actually happening in the classroom?
   f. Does the Enrollment Reconciliation balance and crossfoot?

6. Has an appropriate evaluation method been selected for each of the components?

   a. Where pre-post testing with standardized instruments is being used:

      1. Does the test content relate directly to the instructional content?

      2. Is an appropriate level of the test being used?

      3. Do the testing dates conform to the norming dates?

   b. Where Individual Short-Term Plan/Records are being used:

      1. Is instruction actually managed on an individual basis?

      2. Is instruction actually planned on a short-term (1-9 week) basis?

      3. Are the individual differences within the class sufficient to warrant using this method?

   c. Where Tutoring Request/Reports are being used?

      1. Does the regular classroom teacher clearly understand and agree to abide by the teacher-tutor relationship?

      2. Is the regular classroom teacher willing and able to specify treatment and clearly state criteria?

      3. Does the tutor clearly understand and agree to abide by the teacher-tutor relationship?

      4. Is the tutor competent in all subject areas he will be called upon to tutor?

   d. Where Counseling Request/Reports are being used:

      1. Does the counselor understand and agree to follow the evaluation procedure?

      2. Does the principal (or his specifically designated representative) understand and agree to follow the evaluation procedure?

   e. Where other non-test evaluation procedures are being used:

      1. Does the procedure chosen appear to be appropriate and practical?

      2. Has the third-party evaluator agreed to this approach?

7. Is evaluation data collection proceeding according to plan?

   a. Have pre-tests been completed according to schedule?

   b. Have post-tests been completed according to schedule?

   c. Where IST P/R's, Counseling R/R's and Tutoring R/R's are being used:

      1. Have a reasonable number of plans been initiated and completed?

      2. Are completed forms being sorted and filed properly in preparation for reporting?

8. Are individual MSRTS records being handled adequately?

   a. Are data from IM sources being posted?

   b. Are data from other school sources (such as standardized testing programs) being posted?

   c. Are other data being posted?

   d. Are appropriate measures being taken to insure the security of the records?

BASIC FRAME
MONITORING TASK SHEETS
AND
REPORT FORMS

Monitoring Tasks and Monitoring Reports

The section which follows is a series of numbered monitoring tasks and report sheets. The report forms are numbered to correspond to the task number. Each task sheet describes what is to be done, who is to do the monitoring (there is no single monitor), and when it is to be done. The general cycle is given (quarterly, annually, in the spring, etc.) and a space is provided in the upper right hand corner for recording the actual dates agreed to by the parties involved.

The task sheet also describes what the output is (usually a form report) and its disposition (who gets what copies). Finally, there is a brief statement of what actions could result.

Immediately following each task sheet is a report form or memo form. The forms in this manual may be removed for local reproduction by the person who will do the monitoring. It is suggested that these master copies be returned to the binder for use later.

The reports are of two general types. The first is a form which usually calls for some quantative data, and in some cases, some judgements by the monitor. The second is a memo form which merely specifies the subject and allows a form-free space for the monitor to write the message in general compliance with the directions on the task sheet.

Both the monitor and the person being monitored have access to these task sheets, report forms, and the rest of this monitoring manual, thus there should be no surprises for anyone involved.

Each of the monitoring tasks is subject to modification or deletion and new tasks can be added if necessary. The system is both modular and flexible.

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Next Date _____

Next Date _____

Next Date _____

Monitoring Task Sheet #1, Regular Recruiting Check

When Done? (Cycle) Every two weeks during September and October (or other periods of heavy local recruitment).*

Who Does? Area Director or his appointed representative (or in cases where Area Director is not paid, by MESC Regional Consultant if so desired by Area Director).

Task Description: Determine answers to general question, "How well is recruiting effort progressing?" Examine Home/School Consultant logs and monthly reports and Certificate of Eligibility file. Fill out recruiting report form, a copy of which is attached. Make judgements regarding the appropriateness and effectiveness of the recruitment activities.

Output and Disposition: Regular Recruiting Report** with comments, sent to MESC Regional Consultant who will forward copy to State Coordinator with comments. MESC Regional Consultant will compare fourth report with end of October MSRTS report and reconcile. Copy of fourth report returned to Area Director.

Possible Actions: Intervention of Regional Consultant and/or State Coordinator by MESC, revision of program, staffing, and/or budget.

*Note: For Umatilla-Morrow area, there will also be a check in the middle of May.

**Note: For Marion County, this report will be done on a district basis because of the large enrollments and large numbers of districts involved.

Monitoring Form #1

REGULAR RECRUITING CHECK

Area _____ Monitor _____

Project Year _____ Total students last year _____

Students recruited in the past two weeks:

	Status 1	Status 2	Status 3	Total
First report, date _____				
Second report, date _____				
Subtotal				
Third report, date _____				
Subtotal				
Fourth report, date _____				
Total				

Full-time equivalent days (one person 8 hours) recruiting effort this report period, (Estimated from examination of logs).

1st ____ 2nd ____ 3rd ____ 4th ____ Total _____

Has there been a reasonable amount of recruiting activity?

	1st	2nd	3rd	4th	Overall
yes	☐	☐	☐	☐	☐
no	☐	☐	☐	☐	☐

Have the recruiting activities been appropriate?

	1st	2nd	3rd	4th	Overall
yes	☐	☐	☐	☐	☐
no	☐	☐	☐	☐	☐

(FOR MESC REGIONAL CONSULTANT)

Does the 4th report agree with the end of October MSRTS Report?

Yes ☐ No ☐

Comments: (Please initial and date all comments.)

Initials _____

Next Date _____

Next Date _____

Monitoring Task Sheet #2, Calendar Year End Recruiting Check

When Done? (Cycle) Annually, end of November.

Who Does? Area Director or his appointed representative, or in cases where the Area Director is not paid, by the MESC Regional Consultant if so desired by the Area Director.

Task Description: Determine answer to general question, "Are as many as possible I-M students recruited, certified, and entered into the record system before the end of the calendar year?" (This is necessary to qualify for financial support.) Examine Home/School Consultant logs and monthly reports and the Certificate of Eligibility file. Fill out the Calendar Year End Report form, a copy of which is attached. Make judgements regarding the appropriateness and effectiveness of the recruitment activities.

Output and Disposition: Calendar Year End Recruiting Report* with comments, sent to MESC Regional Consultant who will reconcile it with the end of November MSRTS report and forward a copy with comments to the State Coordinator. Copy returned to Area Director.

Possible Actions: Intervention of MESC Regional Consultant and/or State Coordinator, technical assistance by MESC, revision of program, staffing, and/or budget.

*Note: For Marion County, this report will be done on a district basis because of the large enrollments and large number of districts involved.

Monitoring Form #2

CALENDAR YEAR END RECRUITING REPORT

Area: _____ Monitor: _____

Project Year: _____

Total students last year: _____ Date of this Report: _____

Number of Students

	Status 1	Status 2	Status 3	Total
End of October Report				
Recruited in November				
Total November 30				

Full time equivalent days (one person, 8 hours) recruiting effort during month of November (estimated from examination of logs). _____

Total from end of October report _____

Grand Total _____

Has there been a reasonable amount of recruiting activity:

	From Previous Report (Oct.)	November	Overall
Yes	☐	☐	☐
No	☐	☐	☐

Have the recruiting activities been appropriate?

	From Previous Report (Oct.)	November	Overall
Yes	☐	☐	☐
No	☐	☐	☐

Does this report agree with the end of November MSRTS report?

Yes ☐ No ☐

Comments: (Please initial and date all comments.)

Initials

Next Date _____

Monitoring Task Sheet #3, Certificate Check

When Done? (Cycle) Annual, at the same time as the fourth recruiting report. (See #1)

Who Does? Area Director (or in cases where the Area Director is not paid by MESC Regional Representative if so desired by Area Director.

Task Description: Determine answer to general question, "Are Certificates of Eligibility being handled properly?" Examine files of Certificates. Interview staff members if deemed desirable. Fill out Certificate Check Form, a copy of which is attached.

Output and Disposition: Certificate Check Form, filled out and sent to MESC Regional Consultant who will forward a copy with comments to the State Coordinator. Copy with State Coordinator comments returned to Area Director.

Possible Action: Technical assistance by MESC, intervention by State Coordinator, revision of staff, program, and/or budget.

Monitoring Form #3

CERTIFICATE CHECK FORM

Area _____ Monitor _____

Project Year _____ Term: Regular ___ Summer ___

Date of this Report: _____

Total Number of Certificates in Area _____

1. Are the Certificates of Eligibility properly filled out, signed and dated?

yes, 100%	More than 75%	More than 50%	50% or less
☐	☐	☐	☐

Total number of school locations: _____

2. Are the Certificates properly on file at the school location?

yes, 100%	More than 75%	More than 50%	50% or less
☐	☐	☐	☐

3. Has the Area Director, or his designated representative, (other than Home/School Consultant) approved each Certificate?

yes, 100%	More than 75%	More than 50%	50% or less
☐	☐	☐	☐

Who, other than Area Director is authorized to approve Certificates? List names and titles.

Next Date _____

Monitoring Task Sheet #4, Certificate Sample Check

When Done? (Cycle). Annual, middle of November.

Who Does? MESC Regional Consultant.

Task Description: Determine answer to general question, "Are Certificates of Eligibility being handled properly?" The MESC Regional Consultant will examine a systematic 10% sample drawn (after a random start) from the files of Certificates. Fill out the Certificate Sample Check Form, a copy of which is attached.

Output and Disposition: Two copies of Certificate Sample Check Form, filled out and sent; one to the Area Director and the other to the State Coordinator. Copy with State Coordinator's comments returned to Area Director.

Possible Action: Technical assistance by MESC, intervention by State Coordinator, revision of staffing, program, and/or budget.

CERTIFICATE SAMPLE CHECK FORM

Area: _____ Monitor: _____

Project Year: _____ Date of This Report: _____

Total Number of Certificates in Area: _____

Size of this sample: Percentage _____% Number _____

Number of Schools in sample: _____

1. Are the Certificates of Eligibility properly filled out, signed and dated?

Yes, 100%	More than 75%	More than 50%	50% or less
☐	☐	☐	☐

2. Are the Certificates properly on file at the school location?

Yes, 100%	More than 75%	More than 50%	50% or less
☐	☐	☐	☐

3. Has the Area Director, or his designated representative (other than the Home/School Consultant), approved each Certificate?

Yes, 100%	More than 75%	More than 50%	50% or less
☐	☐	☐	☐

Next Date _____

Next Date _____

Next Date _____

Monitoring Task Sheet #5, Assessments Check

When Done? (Cycle) End of September, October, and middle of April.

Who Does? Area Director or his specifically designated representative, or in areas where there is no paid director, the MESC Regional Representative if so desired by the Area Director.

Task Description: Compare Certificates of Eligibility with Individual Assessment Forms at the school building level. There should be an assessment conducted for every child within two weeks of being declared eligible or the beginning of school.

Output and Disposition: A school by school list of students by migrant status 1, 2, and 3 with Certificates two weeks old but not yet assessed will be compiled. This list with a covering memo will be sent to the person responsible for assessment. A district summary report (copy attached) will be sent to the District Superintendent with a copy to the MESC Regional Consultant. Copy with Regional Consultant's comments returned to Area Director.

Possible Actions: If there are cases where more than 10% of the eligible students in a district have not been assessed within the two-week period, the MESC Regional Consultant will inform the State Coordinator in writing. The State Coordinator will decide what action, if any, needs to be taken.

Monitoring Form #5

ASSESSMENT SUMMARY REPORT, BY DISTRICT

Area _____ Monitor _____

Project Year _____ Term: Regular ____ Summer ____

District _____

1st Report ☐ 2nd Report ☐ 3rd Report ☐

Actual Date of This Report _____ Page ____ of _____

	A Total Certs.	B Total Assess.	C Difference	D No. Over 2 Weeks	D/A %
School: _____					
Status 1:					
Status 2:					
Status 3:					
School: _____					
Status 1:					
Status 2:					
Status 3:					
School: _____					
Status 1:					
Status 2:					
Status 3:					

Comments:

Next Date _____

Monitoring Task Sheet #6, Assessments Sample Check

When Done? (Cycle) Middle of November

Who Does? MESC Regional Consultant

Task Description: Compare a 10% sample of Certificates of Eligibility with Individual Assessment Forms at the school building level. There should be an assessment conducted for every child within two weeks of the beginning of school or the time of being declared eligible. After a random start, draw a 10% systematic sample of students from the Certificate files. List the names or numbers on the attached Assessment Sample Report form. Attempt to locate, at the school, the Individual Assessment forms for these children. Fill out the report form. Total the columns and calculate E/A, the percentage of children who went more than two weeks without assessment and the number and percentage of children who still do not have assessment.

Output and Disposition: Assessment Sample Report form, in two copies, one to Area Director, the other to the State Coordinator. Copy with State Coordinator's comments returned to Area Director.

Possible Action: Technical assistance by MESC, possible intervention by State Coordinator.

Monitoring Form #6

ASSESSMENT SAMPLE REPORT, AREA-WIDE

Area _____ Monitor _____

Project Year _____ Term: Regular _____ Summer _____

Actual Date of this Report _____

Total Certificates in Area _____

Size of this Sample: Percentage _____%, Number _____

A Student Name or Number	B Date on Cert.	C Assess. on File (Yes or No)	D Date on Assess.	E Over 2 Weeks? (✓)
Totals A		Yes	No	E

E/A = _____%

Number of No's in Column C _____

Percent of No's in Column C _____

Monitoring Form #6 Continued

A Student Name or Number	B Date on Cert.	C Assess. on File (Yes or No)	D Date on Assess.	E Over 12 Weeks? (✓)
Totals	A	Yes	No	E

E/A = _____%

Number of No's in Column C _____

Percent of No's in Column C _____

Next Date _____
Next Date _____
Next Date _____

Monitoring Task Sheet #7, MSRTS Records Existence Check

When Done? (Cycle) Monthly in September, October, November

Who Does? Area Director or his specifically designated representative or in areas where there is no paid director, the MESC Regional Consultant, if so desired by the Area Director.

Task Description: Examine samples of MSRTS individual records and Certificates of Eligibility to determine answers to the following:

a. How many and what percentage of certified students do not yet have MSRTS records?

b. How many and what proportion of certified students are not having MSRTS records promptly established?

Procedure:

Go to the school or office and after a random start, select a 5% or larger systematic sample of Certificates of Eligibility from school files. List sample student names on MSRTS Records Existence form. (A copy is attached.) Check existence and timeliness of establishment of MSR for each student with certificate, record on form and subtotal and percentage by school and district.

Output and Disposition: Records Existence Check form accompanied by a brief covering memo with interpretations and comments if necessary; sent to MESC Regional Consultant with a copy to the State Coordinator. Within five days after each of the three reporting periods, the MESC Regional Consultant will submit a brief summary status report to the State Coordinator with supporting data answering questions a and b listed above. Copy with State Coordinator's comments returned to Area Director.

Possible Actions: Intervention by State Coordinator, revision by staff, program, and/or budget, technical assistance by MESC, request for technical assistance by Little Rock Center.

Monitoring Form #7

MSRTS RECORDS EXISTENCE CHECK

Area _____ Monitor _____

Project Year _____ Term: Regular ☐ Summer ☐

1st Report ____ 2nd Report ____ 3rd Report ____

Date of this report: _____

Size of Sample: _____%, _____ Total Students

Arrange list by District and School, subtotal by School and District, total for whole area. Attach blank sheets as necessary.

District _____ School _____

Student Name	Date on Certificate	MSR Exists Yes	MSR Exists No	Date on MSR *	More than 15 days? yes	More than 15 days? no
TOTAL _____		_____	_____		_____	_____
Percent 100		_____	_____		_____	_____

* Date record created

Monitoring Form #7 Continued

Student Name	Date on Certificate	MSR Exists Yes	MSR Exists No	Date on MSR	More than 15 days yes	More than 15 days no
TOTAL ____						
Percent 100						

e record created

Next Date _____

Monitoring Task Sheet #8. MSRTS Records Quality Check

When Done? (Cycle) Annually, middle of December

Who Does? Area Director or his specifically designated representative, or in areas where there is no paid director, the MESC Regional Consultant if so desired by the Area Director.

Task Description: Examine samples of MSRTS Individual Records to make judgements about the completeness of the incoming record, its overall utility to school staff, the accuracy of the recorded data as compared to what is locally known about the student, and to summarize these estimates into an overall judgement of the quality of the record.

Procedure:

Have the MESC Central MSRTS Office select from the Periodic Enrollment Validation Report (PEVR), after a random start, a 5% systematic sample of all MSRTS students in the area, by district and school. Make a list of this sample on the MSRTS Records Quality Check form, a copy of which is attached. Go to the schools, obtain the MSRTS records in question and examine each one. Make an overall judgement of the quality of the record and record on the attached form. Base your overall judgement on a consideration of the following factors:

1. Completeness of Information:

   a. Are there data in all or most all of the categories on the form?
   b. Does the amount of data seem reasonable in view of how long the student has been in the MSRTS?

2. Timeliness:

   Are the data reasonably recent? For example, what was the date of the last reading test score, medical examination, etc.

3. Accuracy and General Representativeness:

   For example, do recorded test scores in reading agree with local teachers judgements of the student's reading ability? Does the overall picture presented by the record agree with what we know about the student?

4. General Utility:

   Did this student's teachers find the incoming record to be useful in planning his educational experiences at this school?

Output and Disposition: Records Quality Check Form, filled out and sent to MESC Regional Consultant who will forward a copy with comments to State Coordinator. Copy with State Coordinator's comments returned to Area Director.

Possible Actions: Technical assistance by MESC, consultation by Little Rock Center, intervention by State Coordinator.

Monitoring Form #8

MSRTS RECORDS QUALITY CHECK REPORT FORM

Area _____ Monitor _____

Project Year _____ Term: Regular ☐ Summer ☐

First Report ✓ Second Report ___ Third Report ___

Date of this Report: _____

Size of Sample: ____%, _____ Total Students

Arrange list by District and School, subtotal by School and District, total for whole area. Attach blank sheets as necessary.

District: _____ School: _____

Student Name	Judged Quality of Record				
	Excellent	Good	Fair	Poor	No Record
TOTALS					
Percent 100					

Monitoring Form # 8 Continued

Student Name	Judged Quality of Record				
	Excellent	Good	Fair	Poor	No Record

Next Date _____

Next Date _____

Next Date _____

Monitoring Task Sheet #9, Services Check

When Done? (Cycle) Twice anually (in October and February) for regular term and once in summer term.

Who Does? Area Director and MESC Regional Consultant jointly.

Task Description: Examine documents and visit schools to determine answers to the following questions:

a. Are the services actually being provided those which were promised in the proposal?

b. Have changes which have been made in services to be provided been properly documented and approved?

c. Are the services being currently provided reasonable in view of what is now known about the needs of the students?

d. Does the Enrollment Reconciliation sheet accurately reflect what services are being provided?

e. Do the component descriptions match with what is actually happening in the classrooms?

f. Does the Enrollment Reconciliation balance and crossfoot?

The documents which should be examined include the following:

a. Enrollment Reconciliation Sheet

b. Student Services List

c. Component Description Sheet

d. Final, approved, funded proposal, as amended

e. Migration Patterns report

f. Last year's evaluation report

Procedure:

Examine documents with the Services Check Sheet in hand. (A copy of the Services Check Sheet is attached.) Record judgements in spaces provided below questions on check sheet.

1. Compare proposal to Enrollment Reconciliation Sheet and Component Description Sheets. Answer questions 1a and 1b; if necessary discuss with Area Director or other staff.

2. Compare Enrollment Reconciliation Sheet, Component Description Sheet, and Student Services Sheets with Migration Pattern Report for this year and last year's evaluation report. Hold brief informal conversations with teachers and other staff. Answer question 2 on check sheet.

3. Visit classrooms, make observations using the Enrollment Reconciliation Sheet, Student Service Lists, and Component Descriptions as guides. Answer question 3 on check sheet.

4. Check the figures on the latest Enrollment Reconcilation Sheet. Do they agree with the Student Service Lists? Does the Reconciliation balance and crossfoot? Answer question 4 on the check sheet.

Output and Disposition: Completed checklist to State Coordinator. Copy with State Coordinator's comments returned to Area Director.

Note: In the case of a large area this procedure ought to be conducted on a district basis.

Possible Actions: Intervention by State Coordinator, modification of program, staff, and/or budget.

Monitoring Form #9 SERVICES CHECK SHEET

Area _____ Monitors (1) _____

(2) _____, MESC

Project Year _____ Term: Regular ___ Summer ___

1st Report ____ 2nd Report ____ Summer Report ____

Date of this Report: _____

1. Actual services match proposal 95% or better?

yes ☐ no ☐

a. If no, have changes been documented and approved?

yes ☐ no ☐

b. If no, is action underway to obtain approval?

yes ☐ no ☐

2. Actual services appear reasonable in light of migration pattern report for this year, last year's evaluation report, and informal discussions with teachers and other staff?

Seem Reasonable ☐ Do not seem reasonable ☐

If not reasonable, comment:

3. Enrollment Reconciliation Sheet, Student Service Lists, Component Descriptions and actual classroom situation match?

yes ☐ no ☐

If no, comment:

4. Enrollment Reconciliation balances, crossfoots, and agrees with Service Lists?

yes ☐ no ☐

If no, comment:

Next Date _____

Monitoring Task Sheet #10, Evaluation Method Check

When Done? (Cycle) Annually, in October.

Who Does? Area Director and MESC Regional Consultant, jointly.

Task Description: Examine component descriptions and last year's evaluation report, visit schools, and make a judgement as to whether or not an appropriate evaluation method has been selected for each component.

Procedure:

Sort the component descriptions by school and evaluation method. For each method used, select the appropriate set of questions (a - e) on the Evaluation Method Check Sheet, a copy of which is attached. Answer questions for each component and make notes on component description sheets. Check last year's evaluation report. Make visits to schools and talk with staff to confirm judgements. Record final judgements on Evaluation Method Check Sheet. Answer sub-questions before making final judgement. Record final judgement at top of the column.

Output and Disposition: Evaluation Method Check Sheet filled out and sent to State Coordinator with copy to third-party evaluator. The third party evaluator will use this sheet in preparation for his site visits. Copy with third-party evaluator's comments returned to Area Director.

Possible Action: Intervention by State Coordinator, technical assistance by third-party evaluator, modification of program, staff, and/or budget.

Monitoring Form #10

EVALUATION METHOD CHECK SHEET

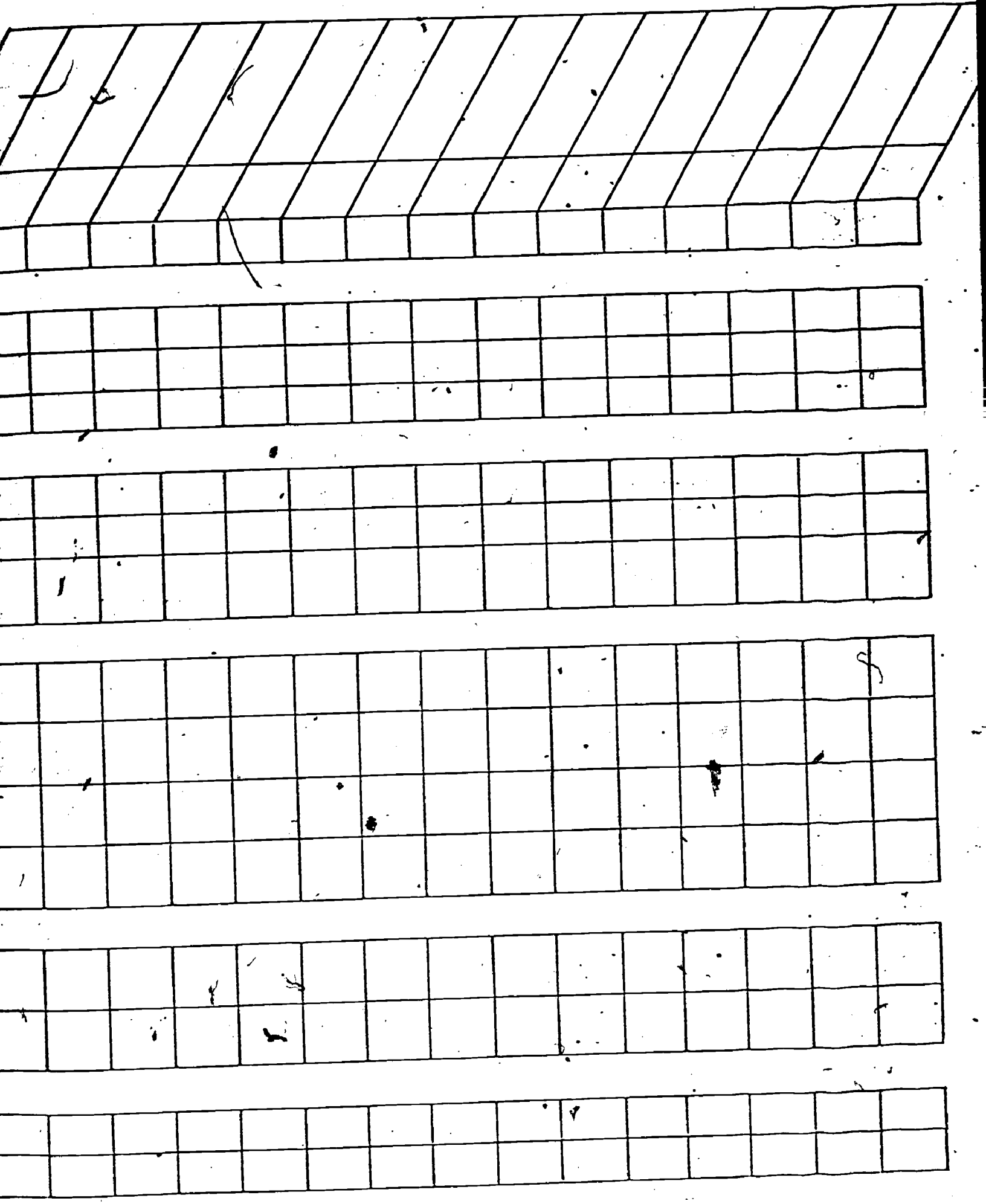
Area _____ Monitor _____

Project Year _____ Term: Regular ___ Summer ___

Date of this report: _____

Answer each question yes or no:

	Component No. / Name
Has an appropriate evaluation method been selected for this component?	
a. Where pre-post testing with standardized instruments is being used:	
1. Does the test content relate directly to the instructional content?	
2. Is an appropriate level of the test being used?	
3. Do the testing dates conform to the norming dates?	
b. Where Individual Short-Term Plan/Records are being used:	
1. Is instruction actually managed on an individual basis?	
2. Is instruction actually planned on a short-term (1-9 week) basis?	
3. Are the individual differences within the class sufficient to warrant using this method?	
c. Where Tutoring Request/Reports are being used:	
1. Does the regular classroom teacher clearly understand and agree to abide by the teacher-tutor relationship?	
2. Is the regular classroom teacher willing and able to specify treatment and clearly state criteria?	
3. Does the tutor clearly understand and agree to abide by the teacher-tutor relationship?	
4. Is the tutor competent in all subject areas he will be called upon to tutor?	
d. Where Counseling Request/Reports are being used:	
1. Does the counselor understand and agree to follow the evaluation procedure?	
2. Does the principal (or his specifically designated representative) understand and agree to follow the evaluation procedure?	
e. Where other non-test evaluation procedures are being used:	
1. Does the procedure chosen appear to be appropriate and practical?	
2. Has the third-party evaluator agreed to this approach?	



Next Date _____

Next Date _____

Next Date _____

Monitoring Task Sheet #11, Data Collection Check

When Done? (Cycle) Twice during the regular term (fall and spring) and once during summer term.

Who Does? Area Director and the MESC Regional Consultant, jointly.

Task Description: Determine answer to the general question, "Is evaluation data collection proceeding according to plan?" This will require both visits to schools and the examination of records. The Evaluation Method Check Sheet should be reviewed before starting this task (see #6). List the components on the Data Collection Check Sheet, a copy of which is attached. Examine records for each component and fill out the Data Collection Check Sheet.

Output and Disposition: Data Collection Check Sheet filled out and sent to State Coordinator with copy to third-party evaluator. The third-party evaluator will use this sheet in preparation for his site visits. Copy with third-party evaluator's comments returned to Area Director.

Possible Action: Intervention by State Coordinator, technical assistance by third-party evaluator, modification of program, staff, and/or budget.

Monitoring Form #11

DATA COLLECTION SHEET, Date of this Report _____

Area _____ Monitor _____ Project Year _____ Term: Regular ___ Summer ___

Answer all questions yes or no:

	Components Name										
	No.										
PRE/POST METHODS:											
a. Have pretests been completed, all data recorded and in area office?											
b. Have posttests been completed, all data recorded and in area office?											
INDIVIDUAL METHODS:											
a. Have a reasonable number of plans been initiated and/or completed?											
b. Are completed forms being sorted and filed properly in preparation for reporting?											
ALL METHODS:											
Is data collection for this component proceeding satisfactorily?											

COMMENTS: (Explain negative answers)

Next Date _____

Monitoring Task Sheet #12, MSRTS Maintenance Check

When Done? (Cycle) Annually, in the spring.

Who Does? MESC Regional Consultant

Task Description: Examine a sample of MSRTS records to determine if data are being entered in a proper and timely manner. Have the MSRTS central office select the sample by area.* After a random start, select a 5% or larger systematic sample. List student names on MSRTS Maintenance Check Sheet, by district, school and grade. (A copy of the Maintenance Check Sheet is attached.) Obtain from central office MSR for each child in sample. Examine each record and fill out Maintenance Check Sheet.

Output and Disposition: MSRTS Maintenance Check Sheet filled out and with comments sent to Area Director with covering memo and to State Coordinator with summary memo. Copy with State Coordinator's comments returned to Area Director.

Note: For Marion County, this will be done by district.

*Note: Population from which sample is drawn should include all students, dead file as well as currently enrolled.

Monitoring Form #12

MSRTS MAINTENANCE CHECK SHEET

Area _____ Monitor _____

District _____ Project Year _____ Term: Regular _____ Summer _____

Date of this Report: _____ Size of Sample _____% _____ Total Students

Record under appropriate heading the dates and description of items entered this school year.

Student Name	Data From 1-M Sources	Data From Other School Sources	Data from Non-School Sources

Total Items to this Date:

Comments:

Monitoring Form #12 Continued

Student Name	Data From I-M Sources	Data From Other School Sources	Data from Non-School Sources

Total Items to this Date:

Comments:

Next Date _____

Monitoring Task Sheet #13, MSRTS Security Check

When Done? (Cycle) Annually in October

Who Does? MESC Regional Consultant

Task Description: To determine if proper security measures are being taken with MSRTS records. MESC Regional Consultant will, during other monitoring visits, make an unannounced visit to a sample of schools. The sample will be purposive in nature and will be selected by the State Coordinator. At the school, the monitor will look for obviously unsecured records (such as those left on a teacher's desk or office counter), will ask staff members at all levels (aide to principal) what the security procedures are and make judgements as to their accuracy and level of understanding by staff and will examine physical files or other locations of records. The monitor will discuss his findings, and possibly, offer suggestions to each principal and Area Director.

Output and Disposition: Memo to Area Director reporting findings and suggestions, copy to State Coordinator. Copy with State Coordinator's comments returned to Area Director.

Possible Actions: Technical assistance by MESC, intervention by State Coordinator.

MONITORING MEMO

Date :

TO: , Project Director Area

FROM: , Regional Consultant and Monitor

SUBJECT: MTSRTS Security Check

ADMINISTRATIVE FRAME MONITORING TASK SHEETS AND REPORT FORMS

The Administrative Frame Monitoring Questions

The portion of the manual which follows is based upon the administrative frame monitoring questions. The reader is reminded that the administrative frame is displayed in graphic format at the beginning of this manual.

The separation of this manual into basic and administrative sections is for convenience of presentation only, no particular sequence is intended. In actual practice some monitoring tasks from both sections may be taking place simultaneously. This may be noted in the Monitoring Schedules presented at the end of this manual.

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MONITORING QUESTIONS
(From the Administrative Frame)-

1. Are the proposed I-M activities reasonable in light of what we know of the circumstances?

   a. Are national and state goals adequately accounted for?

   b. Do the proposed activities appear to be suitable for the expected target population?

      (1) Has there been a significant shift in the migration patterns?

      (2) Has the expected target population been adequately described?

   c. If there is a change in focus from last year's proposal, is there an adequate rationale for the change?

   d. Have the recommendations made in last year's evaluation report been adequately addressed?

2. Are the area projects being staffed in an adequate and timely manner?

   a. Are staff being hired soon enough in the year to foster successful accomplishment of the project?

   b. Do the staff members who are being hired appear to have qualifications which will foster successful accomplishment of the project?

3. Are project budget and expenditure reports up-to-date and accurate?

4. Are the mid-year Performance Reports to the USOE on time and consistant with other documentation?

5. Are the year-end administrative statistics submitted on time and do they appear to be reasonable?

6. Does the inter-agency cooperation effort appear to be adequate?

7. Are parent involvement activities adequate?

   a. Does the schedule of activities appear to be adequate and appropriate for the circumstances?

   b. Are the activities being conducted as scheduled?

Next Date _____

Monitoring Task Sheet #14, Proposal Check

When Done? (Cycle) Annually

Who Does? State Coordinator

Task Description: Examine each are proposal and suppotting documents in order to answer the following general question:

1. Are the proposed 1-M activities reasonable in light of what we we know of the circumstances?

First consider the following sub-questions:

a. Are national and state goals adequately accounted for?

b. Do the proposed activities appear to be suitable for the expected target population?

(1) Has there been a significant shift in the migration patterns? (See also the Area Directors report on migration patterns.)

(2) Has the expected target population been adequately described?

c. If there is a change in focus from last year's proposal is there an adequate rationale for the change? (See also last year's proposal and final evaluation report.)

d. Have the recommendations in last year's evaluation report been adequately addressed? (See last year's evaluation report.)

e. Do the budgeting provisions seem to be adequate and reasonable to support the proposed activities? (See also last year's budget.)

Output and Dispositon: A proposal check sheet (a sample of which is attached) will be filled out for each area proposal. The check sheet will be made in an original and two copies:

Original: Retained by State Coordinator

Copy #1: Sent to Area Director

Copy #2: Attached to proposal and forwarded to State Advisory Committee for use in the proposal review process.

Who Will Review? State Advisory Committee

Possible Actions: Area Director may want to revise proposal. State Coordiantor may reject proposals or require revision. State Advisory Committee may reject proposal or require revision.

Monitoring Form #14

PROPOSAL CHECK SHEET

Date: _____

Area _____ Term: _____

Project Year _____ Regular _____ Summer _____

a. National and state goals O.K.? yes ___ no ___
If no, comment:

b. Any shift in migration patterns? yes ___ no ___
If yes, comment:

c. Expected target population adequately described? yes ___ no ___
If no, comment:

d. Activities appear suitable for target population? yes ___ no ___
If no, comment:

e. Change in focus from last year? yes ___ no ___
If yes, is rationale adequate? yes ___ no ___
If no, comment:

f. Last year's recommedations from the evaluation report adequately addressed? yes _____ no _____

If no, comment:

g. Is the budget reasonable? yes ___ no ___

If no, comment:

h. OVERALL: Do proposed activities appear to be reasonable in light of what we know about the circumstances? yes ___ no ___

If no, comment:

Next Date _____

Next Date _____

Next Date _____

Monitoring Task Sheet #15, Hiring Checks

When Done? (Cycle) Monthly in September, October, November for the regular term. Weekly for the first three weeks of summer term.

Who Does? Area Director

Task Description: Compare actual hires with staffing plan of proposal to answer the following questions:

1. Are staff being hired soon enough in the year to foster successful accomplishments of the project?

2. Do the staff members who are being hired appear to have qualifications which will foster successful accomplishment of the project?

Output and Disposition: Brief cummulative staffing report, a sample of which is attached, sent to the MESC Regional Consultant. The report will be arranged by district and school. Each successive report will be a xerox copy of the previous one with the date changed and new information added. Copy with State Coordinator's comments returned to Area Director.

Who Will Review? State Coordinator

Possible Actions? State Coordinator may provide staff recruiting service via MESC after discussing staffing problems with Area Directors. Area plans may be changed to conform to availability of staff talent.

Monitoring Form #15

AREA PROJECT STAFFING REPORT

Area: _____ Monitor _____

Project Year _____ Term: Regular ____ Summer ____

1st Report: actual date _____ % full ____ % qual. ____ Director's Initials _____

2nd Report: actual date _____ % full ____ % qual. ____ Director's Initials _____

3rd Report: actual date _____ % full ____ % qual. ____ Director's Initials _____

(Note: Arrange positions by District and School, comment on all cases where qualifications were not met. Comment on all unfilled positions on third report.)

osition	FTE	Date on Job	Special Qualifications	Qual. Met Yes or No	Comments

Next Date _____

Monitoring Task Sheet #16, Staff Utilization Check

When Done? (Cycle) Anually, at end of September.

Who Does? Area Director or his designated representative.

Task Description: Compare actual staff assignments with job descriptions, make certain that all 1-M employees are engaged in only legitimate 1-M tasks. Talk with each 1-M employee and building principals and fill out attached Staff Utilization report.

Output and Description: Staff Utilization report, filled out, one copy sent to MESC Regional Consultant who will add comments and forward to State Coordinator. A copy with State Coordinator's comments will be returned to the Area Director.

Possible Actions: Technical assistance by MESC Regional Consultant, intervention by State Coordinator.

Monitoring Form #16

STAFF UTILIZATION REPORT

Area _____ Monitor _____

Project Year _____ Term: Regular _____ Summer _____

Date of this report: _____

(Note: Arrange positions by District and School, comment on all cases where 1-M employee is engaged for significant amounts of time in activities which may not be legitimate.)

Position	FTE	Name	Legitimate 1-M Assignment		Comments
			Yes	No	

Next Date _____

Next Date _____

Next Date _____

Monitoring Task Sheet #17, Budget and Expenditure Checks

When Done? (Cycle) Twice, December 31 and June 30.

Who Does? MESC Regional Consultant

Task Description: Review each area's budget and expenditure reports for previous period. Check for accuracy, appropriateness and consistency. Note only discrepancies and deviations.

Output and Disposition: If significant problems are noted and cannot be resolved by informal means, they will be expressed in a brief memo to the Area Director with a copy to the State Coordinator. Copy with State Coordinator's comments returned to Area Director.

Who Will Review? State Coordinator.

Possible Actions: Corrections of reports, modification of program, modification of budget.

Monitoring Form #17

MONITORING MEMO

Date _____

TO: . Project Director Area

FROM: . Regional Consultant and Monitor

SUBJECT: Budget and Expenditure Check

Next Date _____

Monitoring Task Sheet #18, Mid-Year Performance Report Check

When Done? (Cycle) Annually.

Who Does? MESC Regional Consultant

Task Description: In week before date due, check by telephone to see if mid-year performance reports are in process. On due date, check to see if reports have been received. If reports are missing, phone Area Directors. Read reports and compare to third-party evaluator's site visit notes, Component Description Sheets, expenditure reports, proposal and other available data. Make judgements as to reasonableness of the mid-year performance report.

Output and Disposition: Brief memo to Area Director indicating that the report seems reasonable and if report was or was not on time. If there are discrepencies, a phone call to resolve the differences. If differences cannot be resolved by telephone, then the MESC Regional Consultant will detail them in a memo to the Area Director with a copy to the State Coordinator. Copy with State Coordinator's comments returned to Area Director.

Possible Actions: Revision of report by Area Director, modifications of program and/or budget.

MONITORING MEMO Date _____

TO: , Project Director Area

FROM: , Regional Consultant and Monitor

SUBJECT: Mid-Year Performance Report Check

Next Date _____

Monitoring Task Sheet #19, Year-End Administrative Statistics Check

When Done? (Cycle) Annually, end of school year.

Who Does? MESC Regional Consultant

Task Description: One week before date due, check by telephone to determine if reports are in process. On due date, check to see if reports have been received. If reports are missing, phone the Area Director. Record reports and compare to last year's report, compare to year-end Enrollment Reconciliation, proposal, and third-party evaluator's site visit reports and other available data. Make judgements as to reasonableness of year-end statistics.

Output and Disposition: Brief memo to Area Director indicating that report seems reasonable and was or was not on time; or, if there are discrepancies, a phone call to resolve differences. If differences cannot be resolved by phone, then the MESC Regional Consultant will detail them in a memo to the Area Director with a copy to the State Coordinator. Copy with State Coordinator's comments returned to Area Director.

Possible Actions: Revision of report by Area Director, modifications of next year's program and/or budget.

MONITORING MEMO Date _____

TO: , Project Director Area

FROM: , Regional Consultant and Monitor

SUBJECT: Year-end Administrative Statistics Check

Next Date _____

Monitoring Task Sheet #20, Inter-Agency Cooperation Check

When Done? (Cycle) Quarterly (three times during regular term).

Who Does? Area Directors paid by Title I-M or Regional Representatives in areas where there is no paid director.

Task Descriptions: Review Home/School Consultant's monthly reports, note and summarize instances of inter-agency activities. Make judgements as to appropriateness and sufficiency of inter-agency cooperation.

Output and Disposition: Memo to State Coordinator summarizing amount and judged quality of inter-agency cooperation for project area. Copy with State Coordinator's comments returned to Area Director.

Possible Actions: Intervention by State Coordinator, initiation of special training for Home/School Consultants, technical assistance by MESC.

MONITORING MEMO

Date _____

TO: , State Coordinator

FROM: , Project Director Area

SUBJECT: Inter-agency Cooperation Check

Next Date _____
Next Date _____
Next Date _____
Next Date _____

Monitoring Task Sheet #21, Parent Involvement Check

When Done? (Cycle) Quarterly, three times during the regular term.

Who Does? Area Director (or in cases where there is no paid Area Director, the MESC Regional Representative).

Task Description: Find answers to questions: "Are parent involvement activities adequate?" "Does the schedule of activities appear to be adequate and appropriate for the circumstances?". "Are the activities being conducted as scheduled?"

Obtain and examine schedule of parent activities. Make judgements as to adequacy and appropriateness of events as scheduled.

Obtain copies of minutes of meetings or other reports of parent activities. Make judgements as to adequacy and appropriateness of events as actually conducted.

Output and Disposition: Quarterly memo to MESC Specialist for Parent Involvement and Regional Consultant. First quarter memo will summarize and discuss planned schedule for year plus actual first quarter events. Subsequent memos will summarize and discuss actual events of second and third quarters. Copy with Parent Involvement Specialist's comments returned to Area Director.

Possible Actions: Intervention by State Coordinator, technical assistance by MESC, intervention by State Advisory Committee.

Monitoring Form #21

MONITORING MEMO

Date _____

TO: , MESC Specialist for Parent Involvement

FROM: , Project Director Area

SUBJECT: Parent Involvement Check

Monitoring Schedule Sheets

Two versions of monitoring Schedule Sheets are provided. The first lists each of the monitoring tasks once and indicates the approximate dates it is to be carried out and/or repeated. This schedule gives the best overall view of the monitoring year.

The second version of the Schedule Sheet lists the monitoring tasks as they appear chronologically throughout the year. This arrangement is more useful as a day by day calendar planning device. The tasks are also grouped by who is to do the monitoring, thus this second schedule should be useful to monitors and area directors in negotiating actual dates for monitoring tasks to be carried out.

page 72 blank.

REGULAR TERM MONITORING SCHEDULE SHEET (BY TASK NUMBER)

Month and Approximate Date **

sk	Who	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May
BASIC										
ruiting Check	AD	15, 30	15, 30							
r-End Recruiting Check	AD			30						
tificate Check	AD		30							
ple Certificate Check	MESC			15						
sessments Check	AD	30	30						15	
ple Assessments Check	MESC			15						
TS Records Existence Check	AD	30	30	30						
TS Records Accuracy Check	AD				15					
vices Check	AD and MESC		30				15			
luation Method Check	AD and MESC		30							
a Collection Check	AD and MESC		30						15	
TS Maintenance Check	MESC								1	
TS Security Check	MESC		*							
ADMINISTRATIVE										
posal Check	State									1
ing Check	AD	30	30	30						
aff Utilization Check	AD	30								
dget and Expanditure Check	MESC				30					
l-Year Performance Check	MESC				30					
r-End Admin. Statistics Check	MESC					30				30
ter-Agency Cooperation Check	AD		30			30				30
rent Involvement Check	AD		30							30

announced

ecific dates to be negotiated and agreed upon between Area Director and MESC Regional Consultant

7

REGULAR TERM MONITORING SCHEDULE SHEET (BY DATE)

No.	Task	Who	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May
1	Recruiting Check	AD	15								
1	Recruiting Check	AD	30								
5	Assessments Check	AD	30								
7	MSRTS Records Existence Check	AD	30								
15	Hiring Check	AD	30								
16	Staff Utilization Check	AD	30								
1	Recruiting Check	AD		15							
1	Recruiting Check	AD		30							
3	Certificate Check	AD		30							
5	Assessments Check	AD		30							
7	MSRTS Records Existence Check	AD		30							
9	Service Check	AD and MESC		30							
10	Evaluation Check	AD and MESC		30							
11	Data Collection Check	AD and MESC		30							
13	MSRTS Security Check	MESC		5							
15	Hiring Check	AD		30							
20	Inter-Agency Coop. Check	AD		30							
21	Parent Involvement Check	AD		30							
4	Sample Certificate Check	MESC			15						
6	Sample Assessments Check	MESC			15						
2	Year-End Recruiting Check	AD			30						
7	MSRTS Records Exist. Check	AD			30						
15	Hiring Check	AD			30						
8	MSRTS Records Accuracy Check	AD				15					
75	GO TO NEXT PAGE										

*Unannounced

REGULAR TERM MONITORING SCHEDULE SHEET (BY DATE)

No.	Task	Who	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May
17	Budget and Expenditure Check	MESC				30					
18	Mid-Year Performance Check	MESC				30					
20	Inter-Agency Coop. Check	AD					30				
21	Parent Involvement Check	AD					30				
9	Services Check	AD and MESC						15			
12	MSRTS Maintenance Check	MESC								1	
5	Assessments Check	AD								15	
11	Data Collection Check	AD and MESC								15	
14	Proposal Check	State									1
19	Year-End Statistical Check	MESC									30
20	Inter-Agency Coop. Check	AD									30
21	Parent Involvement Check	AD									30

APPENDIX:
SAMPLE OPERATING FORMS

As of 9/1/78

This appendix contains sample operating forms for the Oregon Migrant Education Program. These are not monitoring forms but rather are the forms used in the day-by-day operations of the program. Some of them were developed and are used in connection with program evaluation. (These forms may be removed and reproduced locally.)

Operating Form # and Title and Last Date Revised

OF 1. End of term General Statistics, 7/1/78
OF 2. Assessment Form, Individual version, 7/1/78
OF 3. Assessment Form, Group version, 7/1/78
OF 4. Enrollment Reconciliation Sheet, 7/1/78
OF 5. Component Description Blank, 7/1/78
OF 6. Student Service List, 7/1/78
OF 7. Test Summary Sheets, 7/1/78
OF 8. Individual Short-term Plan/Records, 7/1/78
OF 9. Individual Short-term Plan/Records Summary, 7/1/78
OF 10. Counseling Request/Report, 7/1/78
OF 11. Counseling Request/Report Summary, 7/1/78
OF 12. Tutoring Request/Reports, 7/1/78
OF 13. Tutoring Request/Report Summary, 7/1/78
OF 14. Other Non-test Summary Sheets, 7/1/78

The above listed forms are used throughout the State. In addition there are a number of locally developed and used forms. The program area most in need of forms standardization at this time is supportive services, particularly in connection with the work of the home/school consultant. It is suggested that all those concerned obtain and examine the set of home/school consultant report forms being used in Yamhill County as a possible base for developing a common set for State-wide use.

Area: _____

General Statistics for End of _____ 19__

1. Number of school districts in your area. _____
   a. Total number of elementary (K-6 or K-8) schools in IM Program. _____
   b. Total number of junior high (7-8 or 7-9) schools in IM Program. _____
   c. Total number of high (9-12 or 10-12) schools in IM Program. _____
   Total number of schools. _____

2. Numbers of eligible IM pupils as of end of _____
   a. By Migrant Type
   (1) Type I, Active Interstate _____
   (2) Type II, Active Intrastate _____
   (3) Type III, Settled In _____
   Totals* _____

   b. By Approximate Age/Grade Categories
   (1) Preschool (ages 4-5) _____
   (2) Elementary (6-11) grades K-6 _____
   (3) Junior High (11-12 or 13) grades 7-8 or 7-9 _____
   (4) High School (13-18) grades 9-12 or 10-12 _____
   Totals* _____

   c. By Ethnic Category (Estimated)
   (1) Mexican American _____
   (2) Other _____
   Totals* _____

   d. By Language Dominance (Estimated)
   (1) Spanish Dominant _____
   (2) English Dominant _____
   Totals* _____

3. Personnel [illegible] by Title I-M funds): (Count as of end of _____)

	Total Head Count	FTE
Teachers/Counselors		
Aides		
Administrators**		
Totals		

4. Total I-M budget for FY____
   Total personnel costs _____
   All other costs _____
   Total _____

*Note: These totals must agree

**By person other than teacher/counselor or aide.

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Individual Assessment Form
Oregon Migrant Education Program
Title IM – ESEA

Student Name _____ Grade _____

MSRTS Number _____ Area _____

School _____ District _____

Date of this Determination _____

Step I – **Examine the Migrant Student Transfer Form** (If no form is available check here and go to Step II)

No MSTR ☐

A. Do the student's latest reading test scores indicate that he was **one or more grades below level** at the time of the test?	Yes	No
B. Do the student's latest math test scores indicate that he was **one or more grades below level** at the time of the test?	Yes	No
C. Does the **Special Programs** section indicate that the student **was participating** in special programs for academic, personal or social adjustment problems within the past year?	Yes	No
D. For a secondary student, does the **Credit Accrual Matrix** indicate that the student might **not graduate** with his age mates?	Yes	No

If there are any Yes marks in Step I, consider the student as a possible candidate for Title IM educational services. If not, go on to Step II.

Step II – Local Indicators

A. Have there been reports from teachers recently or within the past year that the student has not or will not be able to keep up with academic work in the classroom?	Yes	No
B. Have there been reports from teachers, counselors or others that the student exhibits behavior problems anywhere in the school setting?	Yes	No
C. Does the local school accumulative record indicate that there are any problems which might require additional educational help?	Yes	No

If there are any Yes marks in either Step I or Step II, consider the student as a possible candidate for Title IM educational services.

Step III – **Decision to Provide Title IM Services**

In view of all available evidence, including Steps I and II above, the decision is that the Student:

☐ 1. Needs Title IM educational services at this time. The educational services that will be provided this year are:

_____

_____

_____

_____

_____

_____

☐ 2. Does not need Title IM educational services at this time, may need later.

☐ 3. Needs support services. At this time the following services are needed:

- ☐ a. Home visits
- ☐ b. Meals
- ☐ c. Transportation
- ☐ d. Medical/Dental
- ☐ e. Clothes/Shoes
- ☐ f. Student Fees
- ☐ g. Translation
- ☐ h. Advocacy
- ☐ i. Other: Specify _____

☒ 4. Does not need support services at this time, may need later.

Signature _____

Title _____

Date _____

Assessment Form, Group Version

MRSTS No.

School _____

Area _____

District _____

Student Names

Regular Term ___ Summer Term ___

Project Year _____

Report Date _____

Grade

Check (✓) each question applicable to each student.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
STEP I – MSRTS Form (If no form check here and go to STEP II)																				
The latest reading test scores show one or more grades below grade level.																				
The latest math test scores show one or more grades below grade level.																				
Student was participating in special programs for academic, personal or social adjustment problems (as in Special Programs)																				
Secondary students: the Credit Accrual Matrix indicates student might not graduate with his age mates.																				
(If there are any checks in StepII, consider student as possible candidate for Title I-M educational services. If none, go on to Step II.)																				
STEP II – Local Indicators																				
Reports from teachers in past year show that student has not or will not keep up with academic work in classroom.																				
Reports from teachers, counselors or others that the student exhibits behavior problems anywhere in the school setting.																				
Local school accumulative records indicate there are problems which might require additional educational help.																				
(If there are any checks in either Step I or Step II, consider the student as a possible candidate for Title I-M educational services.)																				

Check (√) each service applicable to each student.

STEP III – Provision for Title I-M Services

In view of available evidence, including Steps I and II above, the decision is that the following students need the Title I-M services checked

Students' Names

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Educational services that will be provided this year:																				
a.																				
b.																				
c.																				
d.																				
e.																				
f.																				
g.																				
h.																				
These students do not need Title I-M educational services at this time																				
Support services that will be provided this year																				
a. Home Visits																				
b. Meals																				
c. Transportation																				
d. Medical/Dental																				
e. Clothes/Shoes																				
f. Student Fees																				
g. Translation																				
h. Advocacy																				
i. Other: Specify																				
These students do not need support services at this time:																				

Date _____ Signature _____ Title _____

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Oregon Migrant Education Program
Evaluation Enrollment Reconciliation

Area _____ as of _____

I. Enrollment Reconciliation	No. Students	%
1. Total Eligible I-M children		
2. No. of children assessed but not needing educational services		
3. No. of children needing educational services but not served		
4. No. of children receiving educational services		
5. No. of children in only 1 program component ___ X 1 =		
6. No. of children in only 2 program components ___ X 2 =		
7. No. of children in only 3 program components ___ X 3 =		
8. No. of children in only 4 program components ___ X 4 =		
9. No. of children in only 5 program components ___ X 5 =		
10. Total program components received by eligible children		

II. Educational Program Components*	
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	
15.	
16.	
Total program components received by eligible children	

*Number and type of program components determined locally.

Enrollment Reconciliation Continued

No. Children

Subtotal from Page 1

Grand Total (must equal line 10, section 1, first page)

Enrollment Reconciliation Continued

III. Support Services

	No. Children
1. Home Visits	
2. Meals	
3. Transportation	
4. Medical/Dental	
5. Clothes/Shoes	
6. Student Fees	
7. Translation	
8. Advocacy	
9. Other: Specify	

Comments:

DEFINITIONS OF SUPPORTIVE SERVICES

The following are the definitions to be used when recording and reporting on supportive services. These are the categories shown on Form OF 6 (Student Service List), where the initial recording is done at the school, and on page 3 of Form OF 4 (Evaluation Enrollment Reconciliation) which is used for end-of-term summary reporting.

All of the reporting is to be done in terms of numbers of eligible I-M children who were actually provided with that type of service, regardless of how many times or how much of that type of service was provided.

1. Home Visits: Includes any child whose home was actually visited for advisory, problem oriented, or problem prevention purposes. It does not include the initial home visit made for recruiting since it is assumed that every child will receive at least one visit for recruiting purposes. (See also Other Parent Contact, #9.)

2. Meals: Includes any child provided with breakfast, lunch, or snacks paid for by Title I-M funds.

3. Transportation: Includes any child transported, at Title I-M expense, to school, on field trips, or other educational activities.

4. Medical/Dental: Includes any child provided with medical, dental, optical, or other health related services (for example examinations) which were paid for with Title I-M funds. This does not include free services arranged for but not actually paid for by Title I-M. (See also Advocacy, #8.)

5. Clothes/Shoes: Includes any child provided with clothes, shoes, or other personal necessities (including P.E. uniforms and gym shoes), which were paid for (or otherwise obtained directly, as for example in an I-M conducted used clothes drive) by Title I-M.

6. Student Fees: Includes any child for whom Title I-M has paid student fees (usually at the secondary level) such as student activity cards, locker or towel fees, shop or lab fees, required items such as Weekly Readers, or school newspapers. This also includes any child who was provided with, at Title I-M expense, needed school supplies such as paper, pens, rulers, etc., not regularly provided by the school.

7. Translation: Includes any child for whom individual language interpreting services were provided. Individual means either the child or his family. This service includes language interpreting relating to the student or his family in connection with enrolling in school, any other school processes, or dealings with any other agencies or individuals which affect the child's education. This service definition does not include any general translation service (such as translating a PTA notice which would go home with all children) which might be incidentally provided by a I-M staff member. (See also Advocacy, #8 below.)

8. Advocacy: Includes any child for whom a I-M staff person intervened in connection with a case regarding the child's (or the child's family) education, health, or social well being. Examples might include problems of school attendance, school dress codes, welfare regulations, rental agreements, and the like. This would include making arrangements for service at a free medical or dental clinic. Translation may or may not be required. If it is, see also Translation, #7 above.

9. Other Parent Contact: (This space is labeled Other: Specify on Form OF 4.) Includes any child for whom parent contacts (other than actual home visits) were made. This would include phone calls, individual letters, parent visits to the school (or school event). This does not include notes or general notices sent to all I-M parents. (See also Home Visits, #1 above.) Note: So few entries have been reported in the past in the Other: Specify category that it was decided to use the space to record Other Parent Contact.

Oregon Migrant Education Program
Educational Component Description Work Sheet

Project Year: _____ Term: Regular ☐ Summer ☐

Area (County) _____ Component No. _____

PART A: To be filled out at start of Project by the Area Director

1. **Identification:**

   Name of Component: _____

   Location: District _____ School _____ Other _____

   Level: Preschool (K) Elementary (1-6) Secondary (7-12)

   Content Area _____

   Grade(s) actually covered _____

2. **Objective:**

   Briefly stated, what is the general objective of this Component?

3. **General Approach:** How will the objective be attained?

   a. Are any special instructional methods used?

   b. Any special curriculum materials used?

   c. Who will do this? (Titles, not names)

   d. How much time will be devoted? (Express in hours per week X number of weeks.)

4. **Target Population:**

   a. Approximately how many students are expected for this component?

   b. Are they mostly:

	Approximate %
☐ Anglo, English speaking	____
☐ Mexican American, English speaking	____
☐ Mexican American, Spanish speaking	____
☐ Russian speaking	____
☐ Vietnamese	____
☐ Other _____	____

5. **Evaluation:**

a. Method:

- ☐ Pre/Posttesting with standardized instrument.
  - Test used: _____
  - Level: _____ Form Pre _____ Form Post _____
- ☐ Individual Short-Term/Records.
- ☐ Tutor Request/Report
- ☐ Counseling Request/Report
- ☐ Other, Non-Test Summary Sheet
- ☐ Other, Specify _____

b. Tentative Data Display Format: (How do you want the table to look in the evaluation report.)

PART B: To be filled out at end of term but make sure you collect data during the school year.

1. **Participation:**

Total number of students who actually participated _____

Number of students with data _____, of _____%

Mean days participation:

Those with data _____, or _____%

Those without data _____, or _____%

Oregon Migrant Education Program — Form OE 6

Area _____ School _____ Project year ____ to ____

Regular Term ☐ Summer Term ☐ Date of this Report ____ / ____ / ____

Student Service List

		Educational Components No and Name							Support Services Provided									
	Student Name							Total (Ed.)	Home Visits	Meals	Transportation	Medical/Dental	Clothes/Shoes	Student Fees	Translation	Advocacy	Other*	Total (Support)
									1	2	3	4	5	6	7	8	9	
1																		
2																		
3																		
4																		
5																		
6																		
7																		
8																		
9																		
10																		
11																		
12																		
13																		
14																		
15																		
16																		
17																		
18																		
	Totals																	

No 1's ____
No 2's ____
No 3's ____
Total ____

*Please describe here

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Form OF 7

Test Summary Sheet

Date _____

Area _____ Component No. _____

Test Identification: Name of Test: _____

Level: _____ Form Pre _____ Form Post _____

Type of Score: RAW ☐ STANDARD ☐ G.E.E. ☐ Other Specify: _____

	Student Name or Number	PRE TEST Date _____	POSTTEST Date _____	Do Not Write In This Space
1				
2				
3				
4				
5				
6.				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
	Totals			

Test Summary (Continued)

Component No. _____

Student Name or Number	PRE TEST Date _____	POSTTEST Date _____	Do Not Write In This Space
Totals			

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Individual Student Short Term Plan/Record

Form OF 8

School: _____ District: _____ Area _____

For Dates _____ to _____

Student Name _____ Age _____ or Grade _____
Last First

Content Area _____

Objective: What are we trying to accomplish for this student in this content area, in this short period of time?

Activities: What will be done, when, how much (time), by whom?

Criterion: What specific evidence will we accept to indicate that the objective was attained?

Total Days Participation _____ out of a possible _____

Criterion Attained: Yes _____ No _____ Date _____

Teacher: _____
Signature Title

Comments:

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Oregon Migrant Education Program
Summary Sheet
Individual Student Short Term Plan/Record

Form OF 9

School: _____ District: _____

Area: _____

School Year _____

Component No. _____

Regular Term _____

Component Name: _____

Summer Term _____

Directions: Summarize Individual Student Short Term Plan Records alphabetically on this sheet. Accumulate for whole term. Write student name or number only once.

	Student I.D. No. or Name	No. Objectives Attempted	No. Criteria Achieved	No. Days Actual Participation
1.				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
21				
	Totals			

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Individual Student Short Term Plan Record (continued)

Student I.D. No. or Name	No. Objectives Attempted	No. Criteria Achieved	No. Days Actual Participation
Totals			

Oregon Migrant Education Program
Individual
Counseling Request/Report

Form OF 10

Student Name or Number: _____

Counselor Name: _____

Dates and Amount of Counseling Provided

Date	Minutes

Date	Minutes

Date	Minutes

Disposition of Case:

Problem Solved ☐

Problem Not Solved
Student:

Graduated ☐

Dropped out ☐

End of school year ☐

Not graduated ☐

Services refused by Student ☐

_____
Counselor's Signature

_____
Date

_____
Principal's Signature

_____
Date

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Oregon Migrant Education Program
Counseling Request Report
Summary

Form OF 11

Component Name _____ Component No. _____

1. Total Number Students Served _____

2. Total Number Counseling Request Reports _____

3. No. of cases problem judged solved _____

4. No. of cases problem not solved

   a. And student graduated _____

   b. And student dropped out _____

   c. And student left, end of year _____

   d. And student refused further counseling service _____

Subtotal _____

Total (equals line 2 above) _____

5. No. Request Reports signed by Counselor _____

6. No. Request Reports signed by Principal, or his designated representative _____

7. Total number of counseling sessions provided _____

8. Total hours of counseling provided _____

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Oregon Migrant Education Program

Tutoring Request/Report

Form OF 12

School _____ Date _____

For _____ (Student)

From _____ (Teacher) Grade Subject _____

To _____ (Tutor)

Action Requested

Criterion

Tutoring Task Accepted _____ _____
Tutor's Initials Date

Tutoring Provided

Date	Minutes

Date	Minutes

Date	Minutes

Total Hours Tutoring Provided: _____

Tutoring Task Completed: _____ _____
Tutor's Initials Date

Criterion Achieved: Yes ☐ No ☐ Teacher's Initials _____ Date _____

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Oregon Migrant Education Program
Tutoring Request Report* Summary Sheet

Form OF 13

Project Year _____

School _____ Regular Term _____

District _____ Area _____ Summer Term _____

Component Name _____ Component No _____

Directions Summarize Tutoring Request Reports alphabetically on this sheet. Accumulate for whole term. Write student name or number only once.

Student Name or No	No Tasks Attempted	No Criteria Achieved	Total Hrs. Tutoring Provided

Tutoring Request Report Summary (continued)

Student Name or No	No Tasks Attempted	No Criteria Achieved	Total Hrs Tutoring Provided

Oregon Migrant Education Program
Other Non-Test Summary Sheet

Form OF 14

Area: _____ Project Year: _____ Regular Term _____

Summer Term _____

Component Name: _____ Component No. _____

Has the use of this approach been approved by the third party evaluator? Yes ☐ No ☐ Date: _____

Student Name or Number	Total Days Participation	Student Name or Number	Total Days Participation
Subtotal		Subtotal	

(Attach additional sheets if necessary)

Narrative or other agreed upon evidence:

(Attach additional sheets if necessary)