

Setting the Agenda for Initial Consultation
DPI Guidelines for ESEA Equitable Services, Part 3

The purposes of the initial consultation are to explain the grants, identify needs and facilitate private school decisions about whether to participate. In addition, the consultations will allow the district to collect information for calculation of proportionate share. While the district will organize an agenda that suits its needs and share the required [Summary of Topics and Assurances for Equitable Services](#), the following topics, in no particular order, must be covered.

- Brief descriptions of the grants
- Current student counts for proportionate share
- Proportionate share calculations (based on the most up-to-date allotment information*)
- Understanding and completing the *Affirmation* form during or shortly after the first meeting
- Identification of needs at the school and how that identification is made by the school
- Identification of students and staff eligible for services
- Reasonable, necessary and allowable services
- Funds encumbered by the district, not the private school
- Evaluating the effectiveness of the services
- District responsibilities
 - Gain private school input in planning and implementation
 - Make decisions, based on consultation, about how to best meet the identified needs
 - Provide services, not funding, to eligible private school students and staff
 - Implement and evaluate effectiveness of programs, with help from private schools
 - Create and manage the budgets
 - Conduct all financial transactions, including all hiring, contracting and purchasing
 - Supervise the delivery of services
 - Manage materials, equipment and supplies as district property
 - Follow district policies
 - Document the services and maintain records for future reference
- Private school responsibilities
 - Describe instructional programs and identify needs
 - Provide input to the district for planning and implementation
 - Provide or assist in the collection of student counts for proportionate share calculations
 - Assist in the collection of feedback and other data for evaluation
 - Make staff and students available to service providers in accordance with plans
- Timelines, deadlines and scheduling for the upcoming year

* During or shortly after the consultation, the district must inform each participating private school official of the amount the district expects to spend at their school in each of the accepted programs, based on projected or, if known, planning allotments. The district must inform the schools that it will recalculate these values when the allotment information is updated (i.e., from projected to planning to actual). These updates will still be based on unchanged student counts collected during the late winter or spring consultations. See [Part 6](#) of the Guidelines for more information.

For additional information about equitable services under the Elementary and Secondary Education Act, contact Talbot Troy at 984-236-2797 or talbot.troy@dpi.nc.gov.