**Pre-Monitoring Informational Meeting: ESSER-GEER, 2021-22**

PSU: \_\_\_\_\_\_\_\_\_\_\_ \_

Today’s Date: \_\_\_\_\_

Attendees: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Virtual Interview logistics

* Date is assigned (**\_\_/\_\_/\_\_,** morning/afternoon per notification letter. Time: **­­­­­\_\_\_­­­**
* Platform: Is MS Teams OK? ­­­\_\_\_\_\_\_\_
* Attendees – PSU monitoring lead (PSU employee) plus any others chosen by PSU. The PSU would like invitations sent to the following:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Simple questions and follow-ups.

1. PRCs and Elements

* Allotment & Summary Chart:

PRCs: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Elements

**Element 1:** All plans for expenditure of ESSER-GEER funds have been approved by FPMS and are being or have been implemented by the PSU.

**Element 2:** The activities are being or have been monitored by the PSU to measure effectiveness and allow for any needed adjustments.

**Element 3:** The approved budgets and expenditures support the plans.

**Element 4:** As applicable, the district notified and invited private schools to consult regarding equitable services and has engaged in appropriate consultation. Any accepted equitable services are being or have been implemented and monitored as agreed upon during consultation.

1. Identification of activities funded by the grants (Important first step!)

* See narratives in applications
* Include any changes in plans
* Name your activities with simple descriptions, (i.e., activity titles)
* Don’t leave out activities that were completed in previous fiscal year
* Identified activities will determine the folders you create… See Helpful Hint below

1. The folders

* PSU determines platform (Google or SharePoint work great!)
* PSU name in main folder: e.g., “**Blue Sky School District** ESSER-GEER monitoring”
* Each applicable PRC has a folder. (See list above.)

Each PRC folder has subfolders

* + Element 1 sub-folder with subfolder for each activity.
  + Element 2 sub-folder with subfolder for each activity.
  + No Element 3 sub-folder needed; The Budget/Expenditure Report goes directly in PRC folder.
* Ensure that FPMS staff have access to the folders (i.e., permission is granted).
* Helpful Hint! Activity folder names (brief) will be the answers one of the interview question. (“Can you please identify the activities you are doing with this grant?”)
* Recommendation: finish creating folder before starting to load documents…

1. The documents (due date **\_\_\_/\_\_/\_\_\_\_** at 5:00 PM, per notification letter)

* For Element 1: Implementation of Approved Activities
  + Should reflect the budget codes (see samples).
  + Sometimes, Element 2 docs are also good for Element 1 folders.
* For Element 2: Measurement of Impact
  + Access to services (nursing, counseling, social work, etc.) is a valid measurement.
  + Baseline (prior to implementation) data should be included. (Especially if not yet implemented or new data not yet available)
  + Surveys not yet deployed is valid if the PSU has a timeline for deployment.
* Element 3: Budget and Expenditures
  + Purp Code, Obj Code, Budget, YTD expenditure, Balance (See samples.)
  + Most recent end-of-month or subsequent date
  + OK if only carryover amount is included
  + If all expended last year (no C/O spending), end of year report OK
* In general
  + Provide common formats (PDF, Word, Excel, CSV, PowerPoint, etc.). Avoid proprietary platforms that cannot be accessed by FPMS staff.
  + Must be an artifact of grant-related activity, not a “note-to-file” to provide a stand-in document for this monitoring review.
  + Provide actual documents, rather than links to folder systems containing other documents not requested for this the monitoring.
  + Include date and initials if adding clarifying notes in margins of a documents. (For example, a PD sign-in sheet that did not have a proper heading.)
  + Element 1 and 2 documents should support all activities, including previous year(s).
  + For any type of longitudinal data you are providing, you would only need to provide baseline plus a sample of subsequent info (likely the most recent available set) rather than multiple periodic reports.
  + Recommendation: with document collection, get the low-hanging fruit first.

1. Supporting Documents:
   * [Monitoring Instrument](https://www.dpi.nc.gov/media/13089/download?attachment) (includes interview questions)
   * [Notes on Sharing Documents](https://www.dpi.nc.gov/media/13091/download?attachment)

Questions? Contact your DPI Program Administrator