ID&R PLANNING TEMPLATE

Required Activities for Balanced Recruitment

TX MEP SYSTEMS

THE ID&R PROCESS

1 **PREPARE** — *Train staff & plan for success*

2 **RECRUIT** — *Identify & recruit migratory families*

3 **MONITOR** — *Quality in monitoring & docmentation*

4 **IMPROVE** — *Evaluation results & improvement*

TRAINING FOR RECRUITERS & REVIEWERS

Typical Planning Window: Summer (May-August)

☑	REQUIRED ACTIVITIES *(State mandated)*	DOCUMENTATION	DATE COMPLETED	STAFF *(Responsbile for completing task)*
☐	Complete Texas online ID&R certification course	_____	___ / ___ / ___ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Complete TX-NGS training	_____	___ / ___ / ___ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Complete SEA reviewer training *(if applicable)*	_____	___ / ___ / ___ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Attend ESC ID&R training	_____	___ / ___ / ___ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Review any MEP updates *(COE, TX-NGS, ID&R Manual)*	_____	___ / ___ / ___ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐			___ / ___ / ___ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐			___ / ___ / ___ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐			___ / ___ / ___ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐			___ / ___ / ___ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other

NOTES

_____

_____

_____

Required to complete before recruitment begins

IDENTIFICATION & RECRUITMENT

Typical Planning Window: Fall & Throughout the Year

☑	REQUIRED ACTIVITIES *(State mandated)*	DOCUMENTATION	DATE COMPLETED	STAFF *(Responsbile for completing task)*
☐	Meet with ID&R staff to plan targeted recruitment strategies for maximum impact.	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Assign recruiters to cover district-wide, year-round recruitment efforts.	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Update ID&R calendar with peak agricultural seasons and locations.	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Update ID&R marketing with culturally relevant, multilingual materials to better reach migratory families.	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Engage with potentially eligible migratory families to conduct ID&R for all eligible migratory children ages birth-21 years old.	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Complete COEs and COE Supplemental Documentation Forms (SDFs) as needed	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Designated SEA Reviewer reviews all new COE with new QADs. Return COE to recruiter if additional information is needed.	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Verify continued residency for all currently eligible migratory children who have not made a new QAD during the current reporting period.	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
	School-Based ID&R			
☐	Review and update *family survey*. Ensure these are in the registration materials for all children.	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Coordinate with school staff to ensure *family surveys* are completed and returned to MEP.	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Contact families of potentially eligible children based on responses from *family surveys*.	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Contact current migratory familes to determine if there has been a new qualifying move. Complete COEs.	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Contact families referred via MSIX move notifications and complete COEs.	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Identify and attend events at each school site to present to staff and families about the MEP.	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other

IDENTIFICATION & RECRUITMENT

Typical Planning Window: Fall & Throughout the Year

☑	REQUIRED ACTIVITIES *(State mandated)*	DOCUMENTATION	DATE COMPLETED	STAFF *(Responsbile for completing task)*
	FIELD-BASED ID&R			
☐	Review local maps, agricultural calendars, and worker housing to target recruitment.	_____	____ / ____ / _____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Make recruitment assignments using patterns, worker lcoations, and growing seasons	_____	____ / ____ / _____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Update ID&R calendar with peak agricultural seasons and locations.	_____	____ / ____ / _____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Review H-2A orders to build an employer/housing database, then schedule in-person worker visits with employers.	_____	____ / ____ / _____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
	COMMUNITY-BASED ID&R			
☐	Make recruiter assignments for ongoing contact and coordination with local agencies that serve migrant families/OSY to identify potentially eligible individuals.	_____	____ / ____ / _____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Complete an agency info sheet on each organization in the area that provides services to migratory populations	_____	____ / ____ / _____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Attend all relevant community events for workers, ag companies, and community agencies. Present information on the MEP if possible.	_____	____ / ____ / _____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Visit laundromats, ethnic stores, worker housing, and ESL/Adult Basic Education Classes to post flyers and talk to individuals about the MEP.	_____	____ / ____ / _____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐		_____	____ / ____ / _____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐		_____	____ / ____ / _____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐		_____	____ / ____ / _____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other

NOTES

_____

_____

_____

Best time to complete before recruitment begins

QUALITY CONTROL

Suggested Review: Winter & Spring

☑	REQUIRED ACTIVITIES *(State mandated)*	DOCUMENTATION	DATE COMPLETED	STAFF *(Responsbile for completing task)*
☐	Develop written procedures outlining ID&R quality control	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Monitor TX-NGS entries by reviewing random history lines	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Run TX-NGS reports to doublecheck entered data, eg. district report, unique student count, RV with/without, Alt IDs with/without	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Maintain up-to-date COE records on file, separating active and inactive records. Retain COEs for 7 years from the date eligibility ends.	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Ensure Recruiter and Reviewer actively review COEs “in process” to catch errors before the COE is finalized.	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Forward complex COEs to the ESC for review according to ID&R Manual protocols.	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Partner with ESC to review COEs for monthly quality control compliance as set forth by the TEA MEP.	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Coordinate with ESC for annual eligibility validation through re-interview process set forth by the TEA MEP.	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Monitor and address ongoing training needs and support for ID&R	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Maintain recuitment logs documenting all outreach efforts.	_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐		_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐		_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
		_____	____ / ____ / ____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other

NOTES

_____

_____

_____

Best time to complete is year-round

EVALUATION

Recommended: Late Spring / End of Year

☑	REQUIRED ACTIVITIES *(State mandated)*	DOCUMENTATION	DATE COMPLETED	STAFF *(Responsbile for completing task)*
☐	Gather and analyze data and input from various MEP stakeholders regarding ID&R efforts	_____	____ / ____ / _____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Evaluate ID&R efforts for subsequent planning	_____	____ / ____ / _____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Develop plan for continuous improvement	_____	____ / ____ / _____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐	Assess program, make changes, and improve	_____	____ / ____ / _____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐		_____	____ / ____ / _____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐		_____	____ / ____ / _____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other
☐		_____	____ / ____ / _____ (MM / DD / YYYY)	☐ Recruiter ☐ SEA ☐ MEP Staff ☐ TX-NGS Specialist ☐ Other

NOTES

_____

_____

_____

Best time to complete after recruitment begins

BEST PRACTICES

- Identify and recruit eligible children year-round
- Foster strong partnerships between migratory families, local residents, and community organizations
- Conduct balanced recruitment--within the school and community
- Prepare recruitment materials before school starts
- Document it all!