



2026-2027 Equitable Services Handbook and Operational Guidelines

The purpose of this handbook is to provide clear, consistent guidance for Private Non-Profit (PNP) partners regarding roles and responsibilities, operational procedures, professional development, travel, and material requests related to equitable services. These guidelines are designed to ensure efficient communication, secure data handling, compliance with ESSA, and supports student outcomes through effective collaboration.

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Roles & Responsibilities Overview

Area	ESC	LEA	PNP
Point of Contact	Assign PNP Specialist	Designate LEA Lead	Assign one PNP Contact
Consultation	<p>Schedule and facilitate annual (or more frequent) consultation meetings.</p> <p>Identify and invite eligible PNPs within district boundaries to participate.</p> <p>Provide training and materials explaining equitable services and allowable activities.</p> <p>Document consultation topics, attendance, and decisions made.</p>	<p>Review consultation documentation and retain records locally.</p>	<p>Participate in all meetings</p> <p>Share data on student enrollment and academic/ service needs.</p> <p>Confirm receipt and understanding of consultation documentation.</p>
Planning	<p>Develop service plans based on identified needs from consultation.</p> <p>Provide oversight to ensure services align with federal requirements.</p> <p>Align services to ESSA requirements and student- centered outcomes.</p> <p>Coordinate with third-party providers for services as appropriate.</p>	<p>Provide oversight to ensure services align with federal requirements.</p> <p>Validate eligibility of students and allowable uses of funds.</p> <p>Support logistics or coordination within LEA boundaries.</p>	<p>Collaborate to identify academic and professional development needs.</p> <p>Help identify eligible students who reside in LEA boundaries.</p> <p>Cooperate with ESC and LEA in scheduling and implementing services.</p>
Fiscal Oversight & Fund Management	<p>Align services to ESSA requirements and student- centered outcomes.</p> <p>Calculate the proportionate share of funds for each PNP. Maintain records of expenditures and ensure funds are spent appropriately.</p> <p>Manage carryover funds for future PNP use (if applicable).</p> <p>Track PNP participation status and notify LEA of any changes.</p> <p>Provide an Excel sheet for each Title Program sectioned by each participating PNP that includes verified student counts.</p> <p>Monitor use of funds and communicate any misuse concerns.</p>	<p>Submit accurate student counts for eligible PNP students in grant application.</p> <p>Ensure accurate reservation of funds based on program requirements and verify PNP student counts.</p> <p>Monitor use of funds and communicate any misuse concerns.</p>	<p>Submit timely and accurate enrollment data for eligible students.</p> <p>Ensure services benefit only eligible students and staff, not the school.</p> <p>Work with ESC to determine how carryover funds should be applied.</p>

Roles & Responsibilities Overview *(Continued)*

Area	ESC	LEA	PNP
Point of Contact	Assign PNP Specialist	Designate LEA Lead	Assign one PNP Contact
Procurement, Contracting, and Delivery of Services	<p>Coordinate with third-party providers for services as appropriate.</p> <p>Procure materials, services, or contracted staff using public control.</p> <p>Ensure services are secular, neutral, and non-ideological.</p> <p>Retain ownership and inventory of all materials and equipment.</p> <p>Ensure PNP follows appropriate usage guidelines for ESC-owned property.</p>	<p>Support logistics</p>	<p>Accept services/materials via ESC</p> <p>Accept services delivered through ESC/LEA—no direct funding to PNPs.</p> <p>Provide access to space, students, or staff for services, as needed.</p> <p>Use materials and resources only for allowable educational purposes.</p> <p>Use operational guidelines as outlined in this document.</p>
Monitoring & Evaluation	<p>Monitor effectiveness and compliance of service delivery. Collect data to evaluate program outcomes.</p> <p>Adjust services annually based on evaluation and new consultation.</p>	<p>Assist ESC in collecting local impact data and teacher/student feedback.</p> <p>Review evaluation reports and help adjust service plans.</p>	<p>Allow monitoring access and provide feedback on service effectiveness.</p> <p>Participate in monitoring visits and assist with follow-up. Cooperate with data collection (surveys, participation logs, etc.).</p> <p>Provide input on service quality and unmet needs.</p>
Technical Assistance	<p>Provide training on equitable services rules, funding, and compliance.</p> <p>Offer one-on-one technical assistance as needed.</p> <p>Maintain open lines of communication with all parties.</p> <p>Support PNPs in accessing and understanding services.</p>	<p>Ensure relevant LEA staff are trained and informed. (attending TEA-led grant training, application training, etc.)</p> <p>Request support from ESC for specific implementation concerns.</p>	<p>Attend ESC-offered training sessions or briefings.</p> <p>Ask questions and seek clarification about program requirements.</p> <p>Keep ESC and LEA informed of issues, barriers, or successes.</p>
Documentation	<p>Maintain records of consultation, service plans, expenditures, and evaluations.</p> <p>Keep documentation of outreach, consultation, and participation.</p> <p>Ensure compliance with federal and state program guidelines.</p>	<p>Complete and submit Schedule PS3099 in eGrants system.</p> <p>Alert ESC to potential noncompliance or missed obligations.</p>	<p>Retain documentation of services received and student/staff participation.</p> <p>Follow program guidelines and do not direct the use of funds or services.</p>

Communication & Secure Data Handling

- Each entity (ESC, LEA, PNP) will identify and share a single point of contact to streamline communication.
- No personally identifiable information (PII) may be emailed.
- Each PNP will submit student counts and service needs in an Excel template uploaded to their specific Google Drive

Timeline & Milestones

Milestone	Time Frame	Key Actions
Initial Consultation	Winter	Notify PNPs, hold initial meeting, confirm intent to participate
Data Collection	Early Spring	Collect PNP enrollment
Proportionate Share/PS3099	Spring	Calculate funds, draft PS3099 entries
Individual Consultations	Summer	Discuss allocations and needs assessments
Service Delivery Period	September 1 - August 31	Provide instruction, PD and support services
Mid-Year Monitoring	January	Progress check-in and documentation review
Annual Evaluation & Closeout	Late Spring through Summer	Final review of outcomes, submit closeout forms

Private Non-Profit (PNP) Handbook and Operational Guidelines

PNP Point of Contact

Each participating PNP must designate **one primary point of contact**. This individual will:

- Coordinate travel requests and reimbursements
- Submit material orders
- Submit and track professional development requests
- Serve as the liaison with the ESC PNP Specialist

Consultations

- Attendance at the **Fall Program Meeting** is **required** for all PNP points of contact.
- Participation in the **PNP Open House** (held each spring) is **highly recommended**.
- PNP contacts must attend **scheduled summer consultations** with the ESC PNP Specialist.

Professional Development Requests

- Submit requests **at least 15 business days** prior to the event using the official request form. Incomplete or late forms may result in denial or delays.
- If the ESC PNP Specialist is handling registration, the participant must create a login and share it with the Specialist.
- **Invoices** for professional development must be forwarded to the ESC PNP Specialist upon receipt.
- **Proof of attendance** must be submitted **within 5 business days** of the event's completion.
- Last day to submit professional development requests: **June 30**

Material Requests

- Complete the official Material Request Form.
- Subscriptions must:
 - Be limited to the 26-27 grant year
 - Be prorated if requested mid-year
- All items must be from approved vendors.
- Amazon purchases must include three comparative quotes, including vendor carts and ESC Region 11 Three Quotes Spreadsheet.
- Last day to submit material request: May 1

2026-2027 Region 11 Equitable Services Timeline

Travel Guidelines

Before Travel

- Submit all travel requests **at least 15 business days** before the travel date.
- Ensure the travel form is fully and accurately completed.

Car Rental

- Use only the car originally rented.
- **No upgrades** are allowed.
- Refuel the vehicle **completely** before returning it.

Rideshare Services (ex. Uber and Lyft)

- Rideshare services are reimbursable **until 12:00 a.m.**
- Only **one person per transaction** may submit a receipt for reimbursement.

Hotel

- Provide the Tax-Exempt Form at check-in.
- Ensure state taxes are removed, and the receipt is itemized.
- Notify the ESC PNP Specialist **immediately** if travel plans change.
- Room service fees and gratuities are not reimbursable.

Flights

- All flights are to be booked by the traveler.
- Only economy class airfare is reimbursable.
- Preferred seating, Wi-Fi, and other upgrades are not covered.

Meals

- Only one person's meal per receipt.
- **Alcohol is not reimbursable**; receipts with alcohol will be rejected.
- Receipts must be itemized, legible, and include:
 - Date
 - Meal type (breakfast, lunch, dinner, snack)
- Only food and non-alcoholic beverages are eligible for reimbursement.
- Tips are not reimbursable.
- Do not submit receipts for meals purchased with a PNP credit card.

Travel Reimbursements

Every participant submitting a travel reimbursement form will be required to acknowledge the two Travel Affirmation statements (below) prior to submitting their reimbursement form.

Travel Reimbursement Affirmation

By submitting this reimbursement request, I affirm that all travel was conducted in accordance with the guidelines outlined in the Private Non-Profit Handbook and Operational Guidelines. I confirm that all documentation is accurate, complete, and submitted within the required timelines. I understand that failure to follow the stated procedures may result in delayed processing or denial of reimbursement.

I affirm that all submitted receipts follow the 2026-2027 PNP Operational Guidelines and are an accurate representation of money spent on allowable items during travel. I understand if my submission violates any of the Operational Guidelines, my reimbursement could be delayed or denied.

Handbook Acceptance and Affirmation

By participating in the Private Non-Profit (PNP) program I acknowledge that I have received, read, and understand the **PNP Handbook and Operational Guidelines**. I agree to adhere to the procedures and expectations outlined in this document, including those related to professional development, travel, and material requests.