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| **Massachusetts Department of Elementary and Secondary EducationFund Code:240 – FY18 Making Money Matter (M3) PlanningSmartForm Instructions** |
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| Overview**Districts with** [**2015 or 2016 special education determination levels**](http://www.mass.gov/edu/government/departments-and-boards/ese/programs/accountability/reports/school-and-district-reports.html) **of *Needs Technical Assistance (NTA), Needs Intervention (NI), and Needs Substantial Intervention (NSI)* are required to participate in Making Money Matter (M3). This Excel workbook contains forms that an identified M3 school district must submit** to the Massachusetts Department of Elementary and Secondary Education (ESE) when applying for the Fund Code 240 grant opportunity. The forms are on two separate worksheets within this workbook and requirements are differentiated by *M3 identification year*. For additional information regarding special education determination of district need for technical assistance or intervention please review the [2016 Determination of Need for Special Education Technical Assistance or Intervention](http://www.mass.gov/edu/docs/ese/accountability/annual-reports/special-edu-determinations.pdf) on the ESE *Accountability Lists, Materials, and Tools* webpage. |
| Opening the File, Enabling Macros and Saving the M3 SmartFormClick on the link named **'FY18\_M3\_*District Name\_LEA Code.’*** A dialog box may appear as the file opens prompting you to disable or enable macros and/or data connections. In order to use the workbook you must ‘Enable Macros and Active X’ and/or ‘Enable Data Connection’. Please set your security level to “Low,” then you will reset it once you have completed working with this file. The first tab in the SmartForm provides additional directions for changing your security levels.Once the file is open, select ‘Save As’ and indicate where you want to save the file on your computer. The file is currently named **'FY18\_M3\_*District Name\_LEACode’***. Edit the current file name by replacing the words ‘LEACode’ with your 4-digit LEA code. **For additional assistance please contact your local district IT support personnel.** |
| InstructionsFor your convenience, the following Instructions are also available in the “Instructions” tab of the SmartForm. |
| AssurancesPart I – General Information1. District Information: Select the district name from the drop-down menu. Once the district is selected, the address and *M3 identification year* will auto-populate.

Part II – Re-direction of Funds1. District’s FY18 Fund Code 240 Allocation Amount: This funding amount will auto-populate once the district name is selected in Part I.
2. Percentage of funds to be re-directed for the district’s M3 project: Enter any percentage between 2% - 4%.
3. Total amount of funds for the district’s M3 project: This funding amount will auto-calculate once step 3 is complete.
4. Allowable FY18 Fund Code 274 Amount: This funding amount will auto-populate once the district name is selected in Part I. *This amount of money represents the maximum amount of money a district can re-direct from the 274 funding in order to meet the 2-4% requirement.* (See step 7 below) **Please note: The FY18 Fund Code 274 Special Education: Program Improvement Grant will be released in the fall of 2017; however, the allowable FY18 Fund Code 274 amount will auto-populate in the M3 SmartForm.**
5. Projected Amount of Fund Code 240 for M3: Enter the amount of funds that the district will re-direct from the 240 grant. This amount may be equal to the amount listed in step 4; or, if the district is proposing to use a portion of the Fund Code 274 allocation, then this amount may be less than the amount listed in step 4.
6. Projected amount of Fund Code 274 for M3 (may not exceed the Fund Code 274 amount listed in step 5 above): If the district is proposing to use a portion of the FY18 Fund Code 274 allocation, enter the appropriate 274 funding amount. **Please note: The FY18 Fund Code 274 Special Education: Program Improvement Grant will be released in the fall of 2017; however, the allowable FY18 Fund Code 274 amount will auto-populate in the M3 SmartForm.**
7. Total amount of funds for the district’s M3 project: This funding amount will auto-calculate once steps 6 and 7 are complete. **If completed correctly, step 8 and step 4 should result in the same funding amount.**

Part III – Assurances Statement1. *The school district staff member who is responsible for programmatic oversight* of the 240 grant should: *review*the M3 Assurance Statement and *enter their name, title, and contact information*indicating that they have read and understand the obligations of the district and the purpose and principles of the M3 project, as outlined.
2. Open the M3 Group A or Group B Tab: Click “submit” to automatically open the appropriate tab for each district. Districts with a *FY17 M3 identification year (*2015 special education determination levels of *NTA, NI, or NSI)* will access the Group A tab. Districts newly identified with a *FY18 M3 identification year (*2016 special education determination levels of *NTA, NI, or NSI)* will access the Group B tab.
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| **Group A:** Districts with 2015 special education determination levels of *NTA, NI,* and *NSI*M3FY18 Update and Spending PlanPart IV – M3 Updates1. A short description of substantive updates: ***If*** ***the district has made a substantive change***(s) to the FY18 Action Plan or Multi-year Strategic Plan since the FY17 M3 End of the Year Report, include a short description (2-4 sentences) of the change(s). ***If the district has not made a substantive change***(s) to either plan, enter “N/A.”

Part V – M3 Spending Plan**Important:** This is your projected M3 FY18 Spending Plan, *not* a grant budget workbook. While the M3 spending plan must align with the Fund Code 240 budget entry in Ed Grants, it will not be identical to and cannot be substituted for the Ed Grants budget entry formlet. ESE anticipates that as districts make data-based midcourse corrections to the FY18 Action Plan changes in district spending will also occur. For this reason, this spending plan is considered a non-binding estimate.1. Amount of Funds for the M3 project: Enter the whole dollar amount of funds that will be expended for each Spending Category.
2. Percent of M3 Funds by Spending Category: This percentage will auto-calculate once step 2 is complete. The calculation shows the *percentage of the total M3 funds that will be expended for each* Spending Category.
3. Spending Category Narrative Description and Rationale: For each Spending Category, enter a *very short* description providing detail including, for example, information that clearly identifies the individual or group providing a service and the rationale for proposing a purchase.
4. Total Amount of Funds for the M3 project: This amount will auto-calculate throughout user entry. The calculation shows the sum of all Spending Category amounts entered into the Spending Plan. This cell is intended to be an aid for filling out the Spending Plan. Once the Spending Category amounts are completed, this calculation should result in the same funding amount as "Total amount of funds for the district’s M3 project" on the Assurances Statement and the cell will turn from red to green. If you have completed step #2 to your satisfaction and the cell remains red, you may need to update the information entered on the Assurances Statement and click "submit" in order to ensure this cell will turn green.
5. Percentage of 240 Entitlement Funds for the M3 project: This percentage will auto-calculate throughout user entry. The calculation shows the percentage of the total 240 entitlement funding amount that will be expended for the M3 project in all Spending Categories.

This cell is intended to be an aid for filling out the Spending Plan. Once the Spending Category amounts are completed, this calculation should result in the same percentage as "Percentage of funds to be re-directed for the district’s M3 project" on the Assurances Statement and the cell will turn from red to green. If you have completed step #2 to your satisfaction and the cell remains red, you may need to update the information entered on the Assurances Statement and click "submit" in order to ensure this cell will turn green. |
| **Group B:** Districts that are ***newly identified*** with [2016 special education determination levels](http://www.mass.gov/edu/docs/ese/accountability/annual-reports/account-assist-levels-2016.xlsx) of *NTA, NI,* and *NSI.*M3 What Special Education and General Education Administrators Need to KnowPart IV – General Information* This section includes information on the broad M3 context and requirements.
* There are no submission requirements for Part IV of the SmartForm.

Part V – M3 Process Framework and Early Planning Benchmarks* *Use* this list of suggested process benchmarks to determine your district's next steps and corresponding timeline.
* There are no submission requirements for Part V of the SmartForm.

Part VI – M3 FY18 Progress Reports, Multi-year Strategic Plan, & FY19 Action Plan* *Use* this section to ensure that your district’s planning process will generate information to meet the M3 requirements.
* There are no submission requirements for Part VI of the SmartForm.
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| Submitting the M3 SmartFormOpen EdGrants and upload the SmartForm to the Fund Code 240 application. If you have not already done so, edit the file name, **'FY18\_M3\_*District Name\_leacode’,*** by replacing the words 'DistrictName' and ‘leacode’ with your district's name and 4-digit LEA code. Save.For additional directions regarding how to upload the SmartForm go to pages 15-17 in the <http://www.doe.mass.edu/grants/edgrants/application.docx>. |