



Benefits and Approaches to Documenting Fiscal Processes

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CIFR and IDC in collaboration
with NCSI Fiscal Team.



Session Objectives



- Participants will be introduced to benefits of Fiscal Data Process Development.
- Participants will learn about the work of one state to document a fiscal process.
- Participants will be introduced to the draft IDC IDEA Part B Fiscal Data Processes Template for LEA MOE.
- Participants will have an opportunity for discussion of the draft template and the potential challenges in their states.

What is a fiscal processes protocol?



A tool that provides a structured method for documenting all of the practices (including personnel, departments, timelines, etc.) of the fiscal components of IDEA.

Why is it important?

A well-documented description of the process provides an accessible and understandable roadmap for all related support staff. It helps to ensure consistent implementation of the process and results in quality data!

What are the goals of the Process?



- Building capacity
- Documenting of Fiscal Processes
- Creating a culture of high-quality fiscal data
- Creating agency ownership for the fiscal data
- Opening lines of communication across departments
- Identifying needed changes/modifications to processes

What are some of the benefits?

- Staff involved in this process feel much more confident in their work as a result of having a clearly defined process.
- The fiscal data collected and reported are more accurate and help to meet needs better (overall better decision making).
- Partners and outside agencies have more confidence in those managing the fiscal data and the accuracy of the data.
- A continuous process allows more reflection and provides opportunities to make improvements along the way.
- Institutional knowledge is better preserved over time with this process.

Arkansas Experience

IDC's Part B IDEA 618 Data Processes Toolkit



- There is one protocol per data collection; each protocol has two sections.
 - *Essential Elements* captures basic collection information (e.g., due date, contact information, etc.).
 - *Processes* captures specific steps for the collection, validation, and submission of state IDEA data.

What should be included in fiscal processes protocol at the LEA level?

- Elements (name, regulations, description, staff involved, submission date)
- Processes (collection, validation, internal approval, submission process, data governance)
- Calendar
- Glossary

Let's look at a draft and see what's out of place or missing.

Challenges?



- SEA preparation (advocacy since it's not required, professional development, etc.)
- LEA pre-requisites (staff time and willingness, who should participate?, etc.)
- LEA infrastructure issues

Questions



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