

## CIFR Technical Assistance

# A Story of Intensive Support for South Carolina



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South Carolina's Office of Special Education Services (OSES) in the Department of Education engaged the Center for IDEA Fiscal Reporting (CIFR) to provide intensive technical assistance to help it meet the fiscal requirements of the Individuals with Disabilities Education Act (IDEA). To build states' capacity to collect, analyze, and report high-quality IDEA fiscal data, CIFR provides universal, targeted, and intensive technical assistance through on-site engagements, virtual communities of practice, numerous resources, a website, and a listserv for state educational agency staff with IDEA fiscal responsibilities.

When South Carolina first approached CIFR in 2015, its perceived shortfall in the high-stakes IDEA area called maintenance of state financial support, or MFS, was greater than \$100 million. Under the MFS requirement, states must make available at least the same amount of state financial support from one year to the next for the education of children with disabilities. States that fail to maintain this support may see their federal IDEA grant reduced the same amount by which the state failed to meet the requirement.

### Creating a Plan

When CIFR led a professional development session for OSES staff in the winter of 2016, it became clear that South Carolina needed to revise its MFS methodology. Ensuring that the state uses an accurate MFS methodology was crucial to achieving compliance and accurately determining any possible MFS shortfall.

OSES collaborated with CIFR to create a plan with objectives and intensive TA activities to improve the effectiveness of its operations and data collection. Over several months, CIFR reviewed the state's calculation methodologies, and, as part of this process, OSES invited CIFR staff to join a meeting between state officials and the U.S. Department of Education to understand the federal government's concerns with the state's existing methodology. This conversation yielded insights into potential issues with data quality and state financial support that had been overlooked in earlier MFS calculations.

Through a series of work sessions, CIFR helped South Carolina identify all state-level funds made available for children with disabilities as well

### Timeline of Technical Assistance and Major Events

The specific reporting requirements of IDEA that CIFR supports are: maintenance of state financial support (MFS); allocation of IDEA Part B subgrants to local educational agencies (LEAs); LEA maintenance of effort (MOE); and coordinated early intervening services (CEIS). CIFR's support for South Carolina focused first on MFS but evolved to encompass additional areas.

- **August 2015** — South Carolina OSES Director John Payne applies to CIFR for intensive TA.
- **November 2015** — In-depth conversations among CIFR, Payne, and state staff identify critical issues and areas for professional development.
- **March 2016** — CIFR staff lead two days of on-site professional development on the critical requirements of IDEA using resources created by CIFR, such as the Funding Flow Ideograph Tool and the Data Collection and Reporting Tool.
- **June 2016** — South Carolina joins CIFR's community of practice dedicated to the development of LEA MOE policies and procedures. OSES works across state offices to determine definitions and document detailed procedures. OSES replaces its previous LEA MOE data collection process with CIFR's LEA MOE Calculator.



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as data that were consistently available from year to year to support the calculations. This work required helping staff within the South Carolina Department of Education and other state agencies identify services — such as preschool, transportation, and assessment — provided to children

with disabilities pursuant to Individualized Education Programs, how those services are funded, and how those funds are tracked.

CIFR entered the amounts of state financial support from the South Carolina Department of Education and other state agencies into its MFS Data Collection and Reporting Tool. As state staff proceeded to collect more accurate fiscal data, CIFR carefully documented the state's calculations using the tool.

South Carolina was ultimately able to cut its perceived MFS shortfall by almost half.

At the beginning of 2017, the state submitted its revised MFS methodology to the U.S. Department of Education Office of Special Education Programs (OSEP), and in June OSEP notified the state that the methodology had been approved. OSES Director John Payne wrote to CIFR: **“This is a major step for our state as we can prayerfully now put ‘officially’ to rest this longstanding issue for our state.”**

## Next Steps

In building a trusting and supportive relationship with South Carolina through trainings and individualized assistance, CIFR helped OSES resolve a longstanding problem and minimize financial implications. It increased state staff knowledge and capacity by introducing the Data Collection and Reporting Tool and facilitating the development of procedures that institutionalized the new MFS methodology. State staff continue to use the tool to track and forecast MFS data and to work with CIFR as other IDEA fiscal issues emerge (see Timeline).

CIFR and South Carolina's next collaborative endeavor involves the allocation of IDEA Part B subgrants to local educational agencies. CIFR looks forward to building on its relationship with South Carolina to ensure accurate calculations and reporting.

**“We truly appreciate our continued work together,”** wrote Payne, **“and for all your work in helping South Carolina achieve major milestones to ensure the continued great work we are doing.”**

- **June 2016–January 2017** — Through six focused in-person and virtual sessions, CIFR helps South Carolina train new state staff; engage staff necessary to calculate MFS accurately; assess the MFS methodology, including a comprehensive examination of sources of state financial support using CIFR tools; and ensure consistent reporting across years.
- **July 2016** — CIFR TA providers present at a statewide professional development conference to help South Carolina staff train LEAs on how to use the LEA MOE Calculator.
- **November 2016** — Officials from OSEP and OSES present together at CIFR's IDEA Fiscal Forum 2016 on resolving South Carolina's MFS issues.
- **January 2017** — South Carolina submits its revised MFS methodology to OSEP.
- **June 2017** — OSEP notifies South Carolina that its MFS methodology is approved.
- **July 2017** — At a second statewide conference, CIFR joins South Carolina staff to present to LEAs on LEA MOE and the allocation of IDEA Part B subgrants.
- **August & September 2017** — CIFR helps South Carolina document MFS procedures, based on the methodology approved by OSEP, and LEA MOE procedures.

## CIFR TOOLS ONLINE

Website videos and downloadable one-pagers help states understand and use CIFR products such as the MFS Data Collection and Reporting Tool and the LEA MOE Calculator.

View the Resource Catalog

<https://cifr.wested.org/resources/>