

Draft Agenda

April 15–17, 2020

Phoenix, AZ

IDEA Fiscal Forum 2020

The mission of CIFR IDEA Fiscal Forums is to provide in-person opportunities for state directors of special education and IDEA fiscal specialists to build knowledge and capacity by connecting and sharing with peers on critical IDEA fiscal issues.

Wednesday, April 15

Time	Activity
12:00 p.m.	Welcome and Working Lunch CIFR, OSEP, and the Arizona Department of Education [invited] State team planning, objective setting time and consultation with TA providers
12:30 p.m. – 1:30 p.m.	Opening Plenary Sample Title: Connecting the Dots: Education Policy, Fiscal Accountability, and Outcomes for Students with Disabilities Speaker [invited]
1:30 – 1:45 pm	Transition
1:45 – 3:15 pm	Interactive Breakout Sessions These 90-minute sessions will include sharing from a state participant, TA provider, and/or OSEP staff; an interactive activity; and questions and answers related to a fiscal topic. For continued engagement on the topic, attend the paired facilitated discussion that follows the breakout session at 3.30 pm.
	1a Sample Session: Base Payment Adjustments: The Basics and Complexities
	2a Sample Session: LEA MOE Mechanics and Procedures
	3a Sample Session: Maintenance of State Financial Support: Calculation Mechanics and Key Procedural Components
	4a Sample Session: Proportionate Share Calculations and Responsibilities
	5a Sample Session: Lessons Learned from Implementing Subrecipient Monitoring
3:15 – 3:30 p.m.	Transition

Time	Activity
3:30 – 4:30 p.m.	Facilitated State Networking and Discussion Sessions These 60 minute sessions are an opportunity for states to share questions, solutions, successes, and challenges related to a fiscal topic. Sessions will be facilitated by TA providers and will not be attended by OSEP staff.
1b	Sample Topic: Using the BPA Calculator to Complete Complex Adjustments
2b	Sample Topic: LEA MOE Challenges and Solutions
3b	Sample Topic: MFS Challenges and Solutions
4b	Sample Topic: Proportionate Share Challenges and Solutions
5b	Sample Topic: State Experiences Implementing Fiscal and Program Risk Assessments
4:30 p.m.	Adjourn
5:15 – 6:00 p.m.	Group dinners (by sign-up) departing every 15 minutes

Thursday, April 16

7:30 – 8:15 a.m.	New to IDEA Fiscal – Early Bird Session Specially designed for state staff who are new to IDEA fiscal responsibilities. Foundational knowledge on fiscal topics and resources will be presented. Sessions include a hands-on component and Q & A period. Touch back with the session hosts throughout the day as questions arise. Bring your laptop!
8:30 – 10:00 a.m.	Plenary Session OSEP Ask and Answer OSEP [invited]
10:00 – 10:30 a.m.	Transition
10:30 a.m. – 12:00 p.m.	Interactive Breakout Sessions These 90-minute sessions will include sharing from a state participant, TA provider, and/or OSEP staff; an interactive activity; and questions and answers related to a fiscal topic.
	Sample Session: SEA and LEA Fiscal Responsibilities Under IDEA: The IDEA Fiscal Timeline Tool
	Sample Session: Blending and Braiding Federal, State, and Local Funds for Program Improvement
	Sample Session: Potential Fiscal Implications of Increased Identification of Significant Disproportionality
	Sample Session: Reallocating Part B subgrants to LEAs: Identifying when and how

	Sample Session: Translating Audits to Action: Audit Resolution at the Local, State, and Federal Levels
12:00 – 1:30 p.m.	Regional CIFR Community of Practice Working Lunches (boxed lunch provided)
1:30 – 1:45 p.m.	Transition
1:45 – 3:15 p.m.	<p>Interactive Breakout Sessions</p> <p>These 90-minute sessions will include sharing from a state participant, TA provider, and/or OSEP staff; an interactive activity; and questions and answers related to a fiscal topic.</p> <p>For continued engagement on the topic, attend the paired facilitated discussion that follows the breakout session at 3.45 pm.</p>
6a	Sample Session: Tracking Comprehensive and Voluntary CEIS Data: Understanding the Complexities
7a	Sample Session: Establishing SEA Procedures for the Allocation of IDEA Part B Subgrants
8a	Sample Topic: Using the LEA MOE Calculator to Establish Consistent Procedures and Practice
9a	Sample Session: Meeting Excess Cost Requirements
Repeat Session 10a	Sample Session: Proportionate Share Calculations and Responsibilities
3:30 – 3:45 p.m.	Transition
3:45 – 4:45 p.m.	<p>Facilitated State Networking and Discussion Sessions</p> <p>These 60 minute sessions are an opportunity for states to share questions, solutions, successes, and challenges related to a fiscal topic. Sessions will be facilitated by TA providers and will not be attended by OSEP staff.</p>
6b	Sample Topic: CEIS Data Challenges and Solutions
7b	Sample Topic: Allocating IDEA Funds Challenges and Solutions
8b	Sample Topic: LEA MOE Calculator User Group
9b	Sample Topic: Excess Cost Challenges and Solutions
Repeat Session 10b	Sample Topic: Proportionate Share Challenges and Solutions
4:45 p.m.	Adjourn
5:15 – 6:00 p.m.	Group dinners (by sign-up) departing every 15 minutes

Friday, April 17

7:30 – 8:15 a.m.	<p>New to IDEA Fiscal – Early Bird Session</p> <p>Specially designed for state staff who are new to IDEA fiscal responsibilities. Foundational knowledge on fiscal topics and resources will be presented. Sessions include a hands-on component and Q & A period. Touch back with the session hosts throughout the day as questions arise. Bring your laptop!</p>
8:30 – 10:00 a.m.	<p>Interactive Breakout Sessions</p> <p>These 90-minute sessions will include sharing from a state participant, TA provider, and/or OSEP staff; an interactive activity; and questions and answers related to a fiscal topic.</p>
	Sample Session: Strategies for Evaluating and Documenting Allowable Costs to IDEA Grants and Subgrants
	Sample Session: Establishing Written Fiscal Procedures Using CIFR's Practice Guides
	Sample Session: Shared Mission: Internal IDEA Fiscal Controls Opportunities and Challenges
	Sample Session: Hands-on Training: CIFR's MFS Toolkit
	Sample Session: Deconstructing Federal Fiscal Data Collection Requirements: LEA MOE Reduction and CEIS Data
10:00 – 10:15 a.m.	<p>Transition</p>
10:15 – 11:15 a.m.	<p>Closing Plenary Session</p> <p>Sample Title: Beyond the SEA: What State Fiscal Decisionmakers Need and Want to Know about IDEA</p> <p>Speaker [invited]</p>
11:15 – 11:30 p.m.	<p>Closing Remarks</p>
11:30 p.m. – 1:00 p.m.	<p>Working Lunch (proposed)</p> <p>State team reflection and planning time, facilitated by CIFR and NCSI Fiscal Support Team TA Providers; OSEP staff may be available for state consultation</p>
1:00 p.m.	<p>Conference Adjourned</p>