



CIFR Technical Assistance

New York Adapts CIFR Calculator to Deploy Statewide

NY

New York State is home to more than 700 local educational agencies (LEAs) serving more than 500,000 children with disabilities. Building the capacity of the New York State Education Department (NYSED) to meet the fiscal requirements in the Individuals with Disabilities Education Act (IDEA) involved careful planning along with expertise and resources from the Center for IDEA Fiscal Reporting (CIFR).

Spurring these capacity-building efforts was a February 2016 letter to NYSED from the Office of Special Education Programs (OSEP) at the U.S. Department of Education. The letter, a follow-up from an OSEP state monitoring visit, included comments about improving NYSED's LEA maintenance of effort (MOE) procedures. The LEA MOE requirement obliges any LEA receiving IDEA Part B funds to budget and spend at least the same amount of local, or state and local, funds for the education of children with disabilities on a year-to-year basis. OSEP observed that NYSED was collecting information from LEAs only for the LEA MOE eligibility standard, which concerns the budget requirement, and not for the LEA compliance standard, which concerns actual expenditures on special education and related services.

NYSED and CIFR Work Together

In early 2016 NYSED Administrative Support Group member Todd Harrigan was given responsibility for overseeing the LEA MOE requirement, which included addressing the comments in OSEP's letter. Later that year Harrigan and other NYSED colleagues went to CIFR's IDEA Fiscal Forum (IFF) for state fiscal specialists and reached out for technical assistance on LEA MOE. **"Attending the IFF and meeting CIFR staff in person was the big first step for NYSED,"** Harrigan said. **"Without that initial face-to-face meeting at the IFF, NYSED would not be where we are today."**

After the IFF, a team of CIFR TA providers went to Albany to train Harrigan and his colleagues on the LEA MOE requirement. They

The calculator was not only a way for NYSED to address the comments in OSEP's letter but also to document LEA MOE information electronically.

CIFR TOOLS ONLINE

LEA MOE Organizer

Review regulations and identify TA tools and resources to understand and implement federal LEA MOE requirements.

LEA MOE Calculator

Document and determine whether an LEA's effort meets the IDEA eligibility standard and compliance standard over a five-year period.

Using the LEA MOE Calculator PowerPoint Training Deck

Customize your own training. A *Guide to Slides* provides instructions and suggested talking points.

LEA MOE Instructions At a Glance

Important reminders and tips for entering data into the calculator, all on one page.

View the Resource Catalog
<https://cifr.WestEd.org/resources/>

also introduced CIFR's most downloaded fiscal tool, the LEA MOE Calculator, which helps states and LEAs determine whether both the eligibility (budget) and compliance (expenditures) standards have been met. The calculator brings the mathematical complexities of numerous regulations onto a single Excel platform. It finds the appropriate comparison year and amount for multiple calculation methods and accounts for exceptions and adjustments from current and past years.

The calculator was not only a way for NYSED to address the comments in OSEP's letter but also to document LEA MOE information electronically. By going digital and adapting the tool for the state's 700 LEAs, NYSED would be able to improve its capacity to gather and report complete data.

Preparing to Launch

As NYSED prepared to deploy the calculator, CIFR responded to questions, reviewed materials, and provided training resources for state staff to adapt. For example, Harrigan customized CIFR's *Using the LEA MOE Calculator PowerPoint Training Deck*. He also created a step-by-step guide for the LEAs with processes specific to New York.

In spring 2017 NYSED asked LEAs to enter their data into the calculator for the compliance standard for the 2015–16 academic year. (The typical lag time in LEA MOE compliance reporting is one year.) In response to TA requests from New York and other states, CIFR created and disseminated a one-page overview of the calculator instructions, which helped reduce the number of user questions submitted to NYSED and CIFR.

Harrigan recalled how it all went: **“NYSED’s new method on how to collect LEA MOE data was met with anxiety by all parties. But we knew if we were patient and diligent, the LEAs would adapt to this new policy. I am happy to say that, within the past 18 months, we have made great strides in this effort and are in a great spot in New York State.”**

Today NYSED and many of its LEAs use the calculator for both the eligibility and compliance standards, thus addressing OSEP's monitoring comments. As an LEA monitoring tool, the calculator has improved consistency and enabled electronic access to data, building New York's capacity to gather and report complete LEA MOE data.

**Do you need help supporting your LEAs with LEA MOE?
Contact your CIFR TA Team at cifr_info@WestEd.org.**

LESSONS LEARNED

States building capacity in IDEA fiscal areas can draw on New York's experience:

- Be willing to ask for help, as NYSED did from CIFR.
- Be patient. Changes take time.
- Gain a thorough understanding of the topic at the state level.
- Be prepared to provide a lot of TA to LEAs, asking CIFR for assistance when needed.
- Maintain organized files in the event of staff turnover.

The Center for IDEA Fiscal Reporting (CIFR) provides technical assistance to state educational agencies (SEAs) to help them collect and report special education fiscal data to meet IDEA fiscal requirements, specifically 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).

To build states' capacity and facilitate state sharing on IDEA fiscal issues, CIFR provides universal, targeted, and intensive technical assistance through virtual and on-site engagements, virtual communities of practice, tools and resources, a website, and a listserv for state staff with IDEA fiscal responsibilities.