

IDEA Fiscal Forum 2022: Advancing Resilience, Recovery, and Opportunity

Agenda for the Online Part B Program (Draft)
March 21–24, 2022

Hosted by CIFR, the mission of the **IDEA Fiscal Forum (IFF)** is to provide opportunities for state directors of special education, Part C coordinators, and IDEA fiscal specialists to build knowledge and capacity by connecting and sharing with peers on critical IDEA fiscal issues.

Monday, March 21, 12:30–4:00 p.m. ET

Time (ET)	Activity
12:30 p.m. (90 min.)	IFF 2022 Welcome and Conference Kickoff (45 min.) Opening Plenary Session (45 min.): Topic: The Implications of and Opportunities Related to IDEA Fiscal Requirements: A Conversation with Special Education Leaders
2:00 p.m. (30 min.)	Break

Time (ET)	Activity
<p>2:30 p.m. (90 min.)</p>	<p>Concurrent Interactive Breakout Sessions 1</p> <p>1A: MFS on the Horizon: Common Challenges with Practical Solutions</p> <p>Maintenance of state financial support (MFS) is a high-stakes IDEA requirement that requires careful oversight and advanced planning, especially in times of economic uncertainty. To support states in managing their processes, CIFR and OSEP staff will provide an overview of key MFS regulations and pressing considerations. State presenters will discuss MFS data collection and reporting practices within their respective states, including common challenges and suggestions for mitigating potential MFS failures. This 90-minute session will be interactive and discussion-based, providing the opportunity for participants to pose questions to OSEP, state panelists, and CIFR.</p> <p>1B: Coordinated Early Intervening Services: Making the Connections to Support Outcomes</p> <p>The most effective approach to leveraging coordinated early intervening services (CEIS) to improve child outcomes is an integrated operation, incorporating leaders from special and general education, data, and finance. Using CIFR’s CEIS Step-by-Step, presenters will demonstrate how integration can occur throughout the continuum of activities: identifying reasons for implementing CEIS, developing a need based on the root cause, addressing the need, managing funding, and reporting. What do these connections look like and how can fiscal managers facilitate them? Virginia will share its process for helping LEAs understand these connections and how the SEA models this approach.</p>
<p>4:00 p.m.</p>	<p>Adjourn</p>

Tuesday, March 22, 12:30–4:00 p.m. ET

Time (ET)	Activity
12:30 p.m. (90 min.)	Plenary Session: OSEP Ask & Answer OSEP staff will respond to questions asked in advance by states and based on common questions asked of TA providers and OSEP.
2:00 p.m. (30 min.)	Break
2:30 p.m. (90 min.)	Concurrent Interactive Breakout Sessions 2 2A: Understanding LEA MOE Basics in a Non-Basic Year Local educational agency (LEA) maintenance of effort (MOE) is always a high-stakes fiscal requirement under IDEA. With the COVID-19 pandemic and its effects on the economy and school expenditures, LEAs are facing unique challenges. In this 90-minute session, CIFR experts will discuss the basics of LEA MOE, including: (1) four methods for calculating LEA MOE, (2) the two standards that LEAs must meet each year, (3) the five available exceptions, and (4) the LEA MOE adjustment. Kansas will share its real-world experiences in addressing challenges from the pandemic, followed by time for session attendees to ask questions. 2B: Understanding and Preparing for DMS 2.0: The Fiscal Piece of the Puzzle Differentiated Monitoring and Support (DMS) 2.0 is an in-depth review of states' systems of general supervision, including fiscal systems, aligning compliance and results outcomes for students. All states will go through DMS 2.0's three-phase monitoring with the Office of Special Education Programs (OSEP) over the next five years. In this session, OSEP staff will provide an overview of the DMS 2.0 framework. Participants will also take an in-depth look at the fiscal protocol as well as other federal monitoring protocols related to fiscal systems, and begin to think about how to prepare for DMS through self-review and other activities.
4:00 p.m.	Adjourn

Wednesday, March 23, 12:30–4:00 p.m. ET

Time (ET)	Activity
<p>12:30 p.m. (60 min.)</p>	<p>Concurrent Interactive Breakout Sessions 3</p> <p>3A: Allocation of Part B LEA Subgrants: Addressing the Essentials in SEA Procedures and Processes</p> <p>With the ever-changing educational landscape during COVID-19 and the availability of supplemental IDEA funds, understanding the basic foundational requirements of allocating IDEA Part B subgrants is essential to avoiding high-stakes monitoring of findings or the need for correction. Developing SEA processes that address these requirements will help ensure that LEAs receive the full amount for which they are entitled to educate children with disabilities.</p> <p>This session will familiarize state staff with the overall process for allocating IDEA Part B subgrants, including how LEA eligibility is determined, the process to reserve state set-aside funds, and common issues. Participants will learn about CIFR resources that can help states ensure their allocation procedures and processes are aligned with IDEA Part B requirements.</p> <p>3B: A Closer Look at Excess Cost Requirements</p> <p>Join the NCSI Fiscal Support Team to take a closer look at critical components of the IDEA excess cost calculation. This requirement ensures that LEAs use IDEA funds to pay only the excess costs of providing special education and related services for children with disabilities in a given fiscal year. This session will review required data, calculation methodologies, and COVID-19 relief fund implications. This session will also include a state panel and provide time for questions and answers with OSEP staff.</p>
<p>1:30 p.m. (15 min.)</p>	<p>Break</p>

Time (ET)	Activity
<p>1:45 p.m. (60 min.)</p>	<p>Networking and Discussion Sessions</p> <p>These 60-minute sessions provide opportunities for state staff to network with other states and TA providers to discuss common questions on a specific topic. Participants will select topics and may move from one topic to another. <i>(OSEP will not be in attendance.)</i></p> <p>Topics include:</p> <ul style="list-style-type: none"> • LEA MOE: Exceptions • CEIS: EDFacts data collection changes • Allocations: Making and revising allocations with a focus on population, poverty and base payments and base payment adjustments • Allocations: Implications for recovery and IDEA funds: Tracking spend down and adjustments • Subrecipient monitoring processes and procedures • Proportionate share • Excess cost: Ensuring LEAs meet the requirements • Annual state grant application: Meeting the requirements • Center for the Integration of IDEA Data (CIID): Fiscal data and the Common Education Data Standards (CEDDS) • MFS Data Collection and Reporting Tool: Proposed updates to enhance state use • Open Topic: Connect with peers and open conversation
<p>2:45 p.m. (15 min.)</p>	<p>Break</p>

Time (ET)	Activity
<p>3:00 p.m. (60 min.)</p>	<p>Concurrent Interactive Breakout Sessions 4</p> <p>4A: LEA MOE in Focus: The LEA MOE Adjustment</p> <p>With the influx of IDEA funds from the American Recovery Plan (ARP) Act, many LEAs are eligible to take the LEA MOE Adjustment. During this 60-minute session, a state will present its system for tracking LEAs' eligibility for and use of the adjustment, as well as use of the funds freed up by the adjustment. Experts from CIFR and IDC will discuss the regulations and requirements related to the LEA MOE adjustment and present resources that are available to assist states and LEAs.</p> <p>4B: IDEA Fiscal Responsibilities for Parentally-Placed Private School Students</p> <p>Join the NCSI Fiscal Support Team to learn more about the proportionate share calculation and IDEA fiscal responsibilities for parentally-placed private school students. This session will review the responsibilities of SEAs for ensuring LEAs implement child find, timely and meaningful consultation, the calculation and drawdown of proportionate share funds to ensure the provision of equitable services, and available resources to support SEAs. This session will also include a state panel and provide time for a questions and answers with staff from the Office of Non-Public Education (ONPE).</p>
<p>4:00 p.m.</p>	<p>Adjourn</p>

Thursday, March 24, 12:30–4:00 p.m. ET

Time (ET)	Activity
<p>12:30 p.m. (90 min.)</p>	<p>Concurrent Interactive Breakout Sessions 5</p> <p>5A: Navigating the Reallocation of Unspent LEA Subgrants: Planning Ahead Disruptions to the provision of special education services posed by the COVID-19 pandemic and the infusion of supplemental IDEA funds have impacted LEAs' ability to spend down their funds. When LEAs do not spend the entire IDEA Part B subgrants, SEAs have the flexibility to reallocate the unused funds to other LEAs or to add to their state set-aside. CIFR and state staff will review federal regulations on IDEA reallocations in this 90-minute session, highlighting notable compliance considerations. Presenters will describe how SEAs can proactively develop, revise, and implement reallocation procedures that will help mitigate the risk of returning unused LEA subgrants to the federal government.</p> <p>5B: Understanding and Monitoring Allowable Activities for Coordinated Early Intervening Services LEAs implementing CEIS may be required to create a CEIS implementation plan. In addition to addressing contributing factors of significant disproportionality or, in the case of voluntary CEIS, the issues causing children to be at risk, the plan also describes how the CEIS funds will be spent. This session will help state staff understand activities that are allowable as LEAs develop and implement their plans. The discussion will focus on allowable costs, possible allowable costs, and costs that are never allowable for either required or voluntary CEIS. A state will share examples of how its LEAs use CEIS funds and how it monitors implementation of the plans.</p>
<p>2:00 p.m. (30 min.)</p>	<p>Break</p>
<p>2:30 p.m. (90 min.)</p>	<p>Closing Plenary (60 min.) Tentative topic: The Importance of Fiscal in Uncertain Times</p> <p>Thank You and Closing</p>