

Part C IDEA Fiscal Forum 2023

Purpose-Driven Data: Putting the “Why” Into Fiscal Processes

Agenda
May 9–11, 2023

Hosted by CIFR, the **IDEA Fiscal Forum (IFF)** provides opportunities for Part C coordinators, and IDEA fiscal specialists to build knowledge and capacity by connecting and sharing with peers on critical IDEA fiscal issues.

Tuesday, May 9, 9:00 a.m.–5:00 p.m.

Time (ET)	Activity
9:00 a.m. (180 min.)	<p>Concurrent Breakout Sessions 1</p> <p>1A: Nuts and Bolts: Part C Fiscal Requirements</p> <p>This introductory session examines how states use and track their Part C funds, monitor for compliance, and report fiscal data. Interactive peer-to-peer learning activities will explore ways to collect fiscal data and how they relate to fiscal requirements. Participants will also learn about resources to improve the collection, use, and reporting of Part C grant fiscal data and reflect on their state processes and their own needs to reinforce session learning.</p> <p><i>Beth Cole (CIFR), Allison Davey (CIFR) Ardith Ferguson (CIFR), Charles Kniseley (OSEP), Vera Stroup-Rentier (CIFR)</i></p> <p>1B: Put Your Data to Work: Using Data for Planning and Forecasting</p> <p>Do you fully understand your funding sources and have enough resources to support your Part C early intervention system? Learn how to track your revenue and expenditures, including Medicaid and private insurance, and use that information to plan for the future. Explore how different funding sources affect equitable distribution across the state. A panel of state staff will talk about tracking in their state systems and key factors to keep in mind. Concludes with a discussion on how to apply these insights to your own state system.</p> <p><i>Ron Benham (CIFR), Stacy Calendar (Mississippi), Christina Commons (Indiana), Maureen Greer (CIFR), Jennifer Kaufmann (Rhode Island), Sarah Walters (CIFR), Kim Wedel (CIFR)</i></p>
12:00 p.m.	Lunch (Provided)

Time (ET)	Activity
12:30 p.m. (90 min.)	Welcome and Opening Plenary <i>Kevin Byrd (Georgia), David Cantrell (OSEP, OSERS), Leslie Fox (CIFR), Laura Kender (My Health My Resources of Tarrant County, Texas), Dave Phillips (CIFR)</i>
2:00 p.m. (30 min.)	Break
2:30 p.m. (90 min.)	<p>Concurrent Breakout Sessions 2</p> <p>2A: Tracking Maintenance of Effort: What Data Do You Need?</p> <p>Learn the requirements of the supplement not supplant provisions, also known as maintenance of effort (MOE), for IDEA Part C. Discussion topics include: a) navigating relationships across state agencies to better understand their role in calculating MOE, b) strategies for communicating within and between agencies, and c) sources of state and local public data for tracking MOE. Concludes with state strategies and challenges around working through MOE.</p> <p><i>Laura Duos (OSEP), Katy McCullough (ECTA), Vera Stroup-Rentier (CIFR), Kim Wedel (CIFR)</i></p> <p>2B: Spending Your Federal Part C Funds: First In/First Out</p> <p>Using federal funds on time is a challenge for states. As we examine the federal requirements for using Part C funds, OSEP staff will talk about how they help states draw-down funds in a timely manner. CIFR staff will demonstrate a tool and discuss strategies to help track funds to comply with federal regulations. Attendees will participate in small and large group discussions.</p> <p><i>Allison Davey (CIFR), Ardith Ferguson (CIFR), Danny Rice (OSEP), Shilan Wooten (CIFR)</i></p> <p>2C: If You Knew Then What You Know Now: Lessons Learned from Fiscal Staff</p> <p>Join us for a lively discussion with fellow Part C fiscal colleagues. State panelists will share what they wished they had known when starting out, pitfalls to avoid, and strategies and resources they now use to do their jobs well. TA staff will provide an overview of Part C fiscal and data concepts that may be unfamiliar to new fiscal staff.</p> <p><i>Andres Alvarado (District of Columbia), Barbara McGowen (Maine), Meg Nelson (CIFR), Sarah Walters (CIFR)</i></p>
4:00 p.m. (60 min.)	Networking: Meet TA Providers and OSEP Staff

Wednesday, May 10, 8:30 a.m.–5:00 p.m.

Time (ET)	Activity
<p>8:30 a.m. (90 min.)</p>	<p>Concurrent Breakout Sessions 3</p> <p>3A: Fiscal Processes: Who Does What and Is It Written Down?</p> <p>This session will explore the difference between public-facing policies and the internal operating procedures necessary to carry out those policies. Following a state panel discussion on revising fiscal procedures, participants will break into small groups to discuss internal procedures needed to ensure compliance with the prohibition against supplanting, also known as maintenance of effort. Identify key procedural components that take into account your state’s unique structure.</p> <p><i>Sandy Cade (Montana), Beth Cole (CIFR), Laura Duos (OSEP), Katy McCullough (CIFR), Tracy Turner (Arkansas)</i></p> <p>3B: Follow the Money: Tracking and Forecasting Part C Revenue and Expenditures</p> <p>BYODCC (Bring Your Own Data, Computer, Coffee)! Use your own data to learn how to track and forecast your Part C revenue and expenditures or refine existing methods. A sample template will be provided for this hands-on exercise. Be sure to bring your own computer and the tracking and forecasting forms you already use, if any, and be prepared to access two years of your state data on:</p> <ul style="list-style-type: none"> • Child count • Eligibility • Average number of services predicted and delivered (if available) • Child welfare • Revenues and expenditures by source <p><i>Ron Benham (CIFR), Maureen Greer (CIFR), Sarah Walters (CIFR), Kim Wedel (CIFR)</i></p> <p>3C: Subgranting: Where to Begin and What It Means for Fiscal Oversight</p> <p>Learn about recent OSEP guidance on, and CIFR resources to support, subgranting decisions and processes. CIFR TA staff will outline steps and timelines for planning to subgrant and review implications for general supervision responsibilities. Through discussion and use of state examples, presenters will highlight the components of assessing subgranting risks and readiness that participants can adapt to their state needs.</p> <p><i>Leslie Fox (CIFR), Kala Shah Surprenant (U.S. Department of Education)</i></p>
<p>10:00 a.m. (30 min.)</p>	<p>Break</p>

Time (ET)	Activity
<p>10:30 a.m. (90 min.)</p>	<p>Concurrent Breakout Sessions 4</p> <p>4A: Managing Fiscal Oversight Responsibilities: Implications for Contracts and Other Funding Methods</p> <p>Get up to speed on the IDEA and Uniform Guidance requirements for overseeing federal Part C funds. Veteran state fiscal managers will share their successes and challenges implementing their lead agency's fiscal responsibilities with various contracted and interagency partners.</p> <p><i>Allison Davey (CIFR), Ardith Ferguson (CIFR), Maureen Greer (ITCA), Jeremiah Hale (Arizona), Janene Roche (Texas), Ian Tholen (Hawaii)</i></p> <p>4B: Part C Data Managers – Strategies for Working with Data to Inform Fiscal Decisions</p> <p>How can data inform fiscal decision-making that ultimately improves programs and systems? TA providers from multiple centers will highlight sources of data and how to gather and analyze to guide decisions about IDEA funds. In small groups, data managers will share their data practices and how to effectively communicate information to partners within the Part C program. Presenters will walk through a scenario showing how fiscal data can drive decision-making.</p> <p><i>Stephanie Donald (South Carolina), Grace Kelley (DaSy), Charlene Robles (ECTA), Shilan Wooten (CIFR)</i></p> <p>4C: Using Federal IDEA Funds to Support the EI Workforce</p> <p>Join a conversation with your fellow Part C coordinators! In this interactive session, you will learn about initiatives, strategies, and activities that have been successfully implemented to support the early intervention (EI) workforce. Hear from a panel of states about efforts to strengthen the capacity of the EI workforce to serve infants and toddlers with disabilities and their families, particularly in underserved communities. You'll learn about how federal Part C and ARP funds are used to support these initiatives, including to recruit and retain diverse and highly qualified personnel.</p> <p><i>Benny Delgado (Illinois), Leslie Fox (CIFR), Meg Nelson (CIFR), Nicole Topper (Delaware)</i></p>
<p>12:00 p.m. (120 min.)</p>	<p>Break</p> <p><i>Lunch is on your own.</i></p>

Time (ET)	Activity
<p>2:00 p.m. (90 min.)</p>	<p>Concurrent Breakout Sessions 5</p> <p>5A: ITCA Fiscal Initiative: Building Sustainable Finance Systems</p> <p>Explore strategies to maximize funding streams for early intervention. A panel of state staff will share insights from participating in the ITCA Fiscal Initiative. They will showcase their project goals and progress and the impact of their efforts on their early intervention systems. Panelists will also discuss ongoing efforts to maintain sustainability of their project outcomes.</p> <p><i>Ron Benham (ITCA), Katy McCullough (ECTA), Kim Wedel (ITCA)</i></p> <p>5B: Not Just Fun and Games: Using Gamification to Meaningfully Engage Partners with Fiscal Data</p> <p>The complexities of IDEA fiscal data and requirements can create a barrier to meaningful engagement between state lead agencies (LAs) and their partners. Gamification is a strategy that can promote learning and increase engagement between LAs and those who help them make informed budget decisions and implement a coordinated and effective early intervention system. Using fun and interactive examples of effective gamification techniques, presenters will explain what it is and how it can help. This hands-on session is more than fun and games!</p> <p><i>Allison Davey (CIFR), Christina MacDonald (IDC), Sarah Walters (CIFR), Shilan Wooten (CIFR)</i></p> <p>5C: The Fiscal Single Line of Responsibility Protocol: Not Just for DMS Anymore</p> <p>OSEP uses the fiscal Single Line of Responsibility (SLOR) protocol to assess the strengths, progress, challenges, and needs of state lead agencies. In this “beyond the basics” session, you will learn how the fiscal SLOR can help you:</p> <ol style="list-style-type: none"> 1) document your fiscal system to meet Part C requirements, 2) expand your knowledge of Part C and Uniform Guidance fiscal requirements, and 3) identify and create written policies and procedures as needed. <p>TA staff will guide you through four key sections of the SLOR: general supervision, monitoring, identification and coordination, and financial responsibility. You’ll hear from Part C staff from Wisconsin about how they use the fiscal SLOR to assess their system, pinpoint areas for improvement, and plan for sustainability and succession.</p> <p><i>Ardith Ferguson (CIFR), Tessa Freedberg (Wisconsin), Vera Stroup-Rentier (CIFR)</i></p>
<p>3:30 p.m. (15 min.)</p>	<p>Break</p>

Time (ET)	Activity
3:45 p.m. (75 min.)	<p>Taking the “Work” Out of “Networking” Social Hour!</p> <p>Join us for a networking social hour at the end of the day, where you can connect with colleagues over light refreshments, instead of dashing to your room for a zoom call or reading email. This is the perfect opportunity to unwind, learn a little more about one another, and have informal conversations on common fiscal topics with your peers.</p>

Thursday, May 11, 8:30 a.m.–12:00 p.m.

Time (ET)	Activity
8:30 a.m. (120 min.)	<p>Concurrent Breakout Sessions 6</p> <p>6A: Strategies for Using Data in Fiscal Monitoring</p> <p>Presenters will discuss the role of data in fiscal monitoring and examine internal controls, use of funds, system of payments, and payor of last resort. State panelists will share their successes and challenges using fiscal data to effectively monitor compliance. Participants will be invited to reflect on how these lessons apply to their own state’s fiscal monitoring practices.</p> <p><i>Lisa Casteel (Arizona), Tammy McCauley (Washington), Katy McCullough (DaSy/ECTA), Meg Nelson (CIFR)</i></p> <p>6B: Understanding and Leveraging Federal Funds to Serve Native American/ Indigenous Families and Tribal Communities</p> <p>What federal funds are available to support early intervention services and activities for Native American and Indigenous families and tribal communities? Presenters will share the strategies, activities, and approaches that have helped them serve traditionally hard-to-reach and underserved infants, toddlers, and families from Native American and other tribal communities.</p> <p><i>Leslie Fox (CIFR), Jennifer Wolfsheimer (Wested)</i></p> <p>6C: Telling the Story of Your Budget and Why It Matters</p> <p>Learn from a panel of state Part C staff how to present budgets to a variety of audiences. Participants will explore creative strategies, such as using visuals and graphics, to showcase key financial information and discuss how to overcome challenges to sharing budgets in ways that are meaningful and accessible.</p> <p><i>Ron Benham (CIFR), Beth Cole (CIFR), Jeremiah Hale (Arizona), Lori Ann Malina-Lovell (Nevada)</i></p>

Time (ET)	Activity
10:30 a.m. (30 min.)	Break and Hotel Checkout
11:00 a.m. (60 min.)	Closing Plenary OSEP Q&A
12:00 p.m.	Adjournment (<i>Boxed lunch to go is provided.</i>)