



New IDEA Directors Meeting

Jamie Eldridge | Director of IDEA Oversight

Melanie Lamberson | East TN IDEA Oversight Coordinator

Janet Michelle Mansfield | West TN IDEA Oversight Coordinator

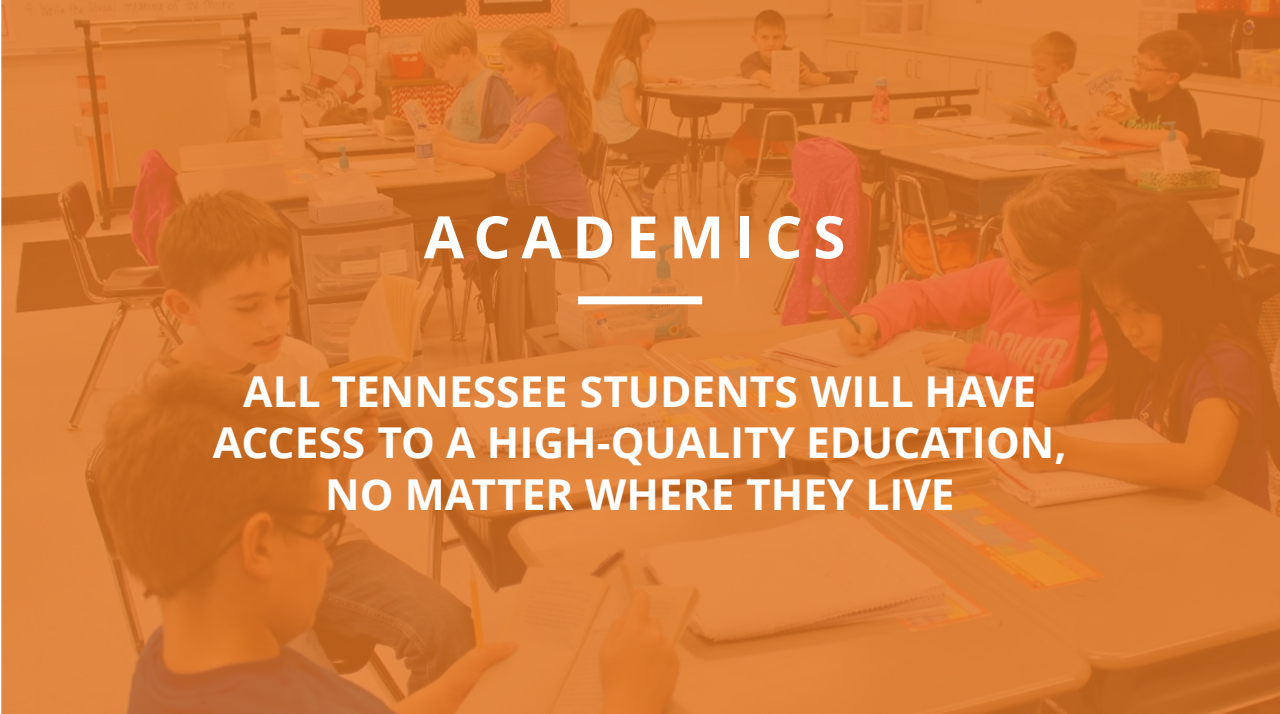
Federal Programs and Oversight, Aug. 21, 2023





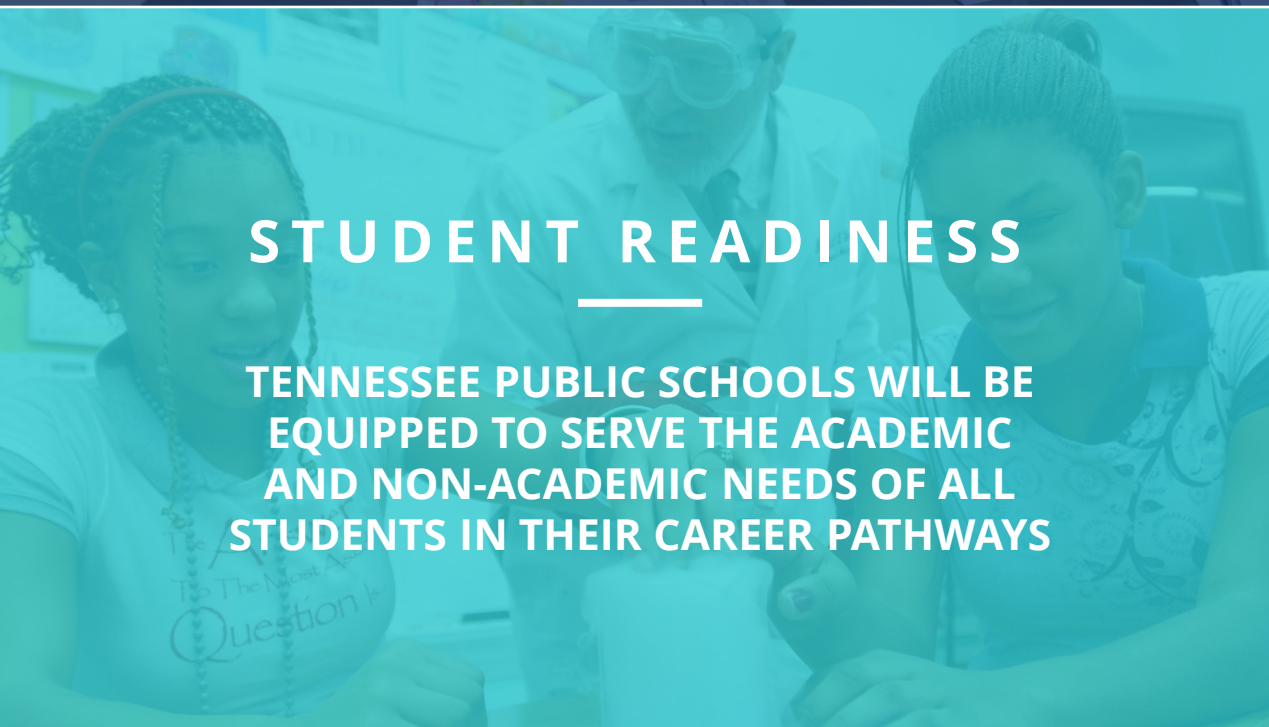
BEST FOR ALL

We will set all students on a path to success.



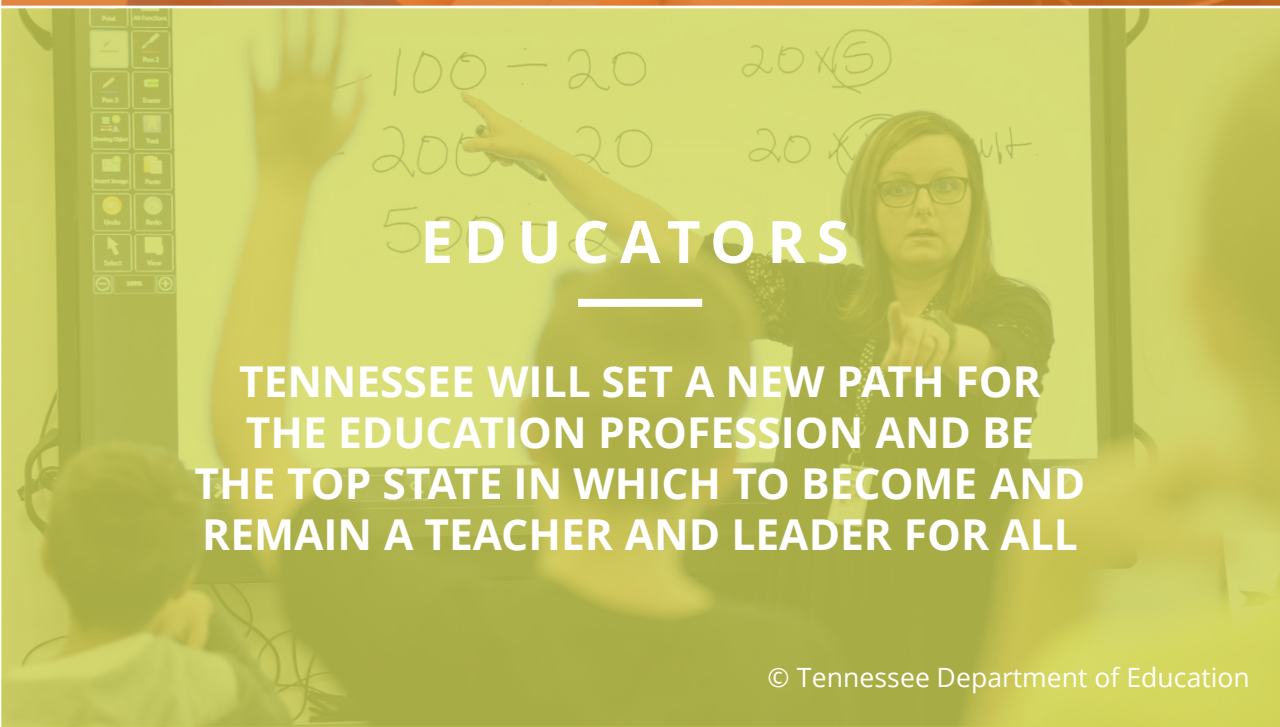
ACADEMICS

ALL TENNESSEE STUDENTS WILL HAVE ACCESS TO A HIGH-QUALITY EDUCATION, NO MATTER WHERE THEY LIVE



STUDENT READINESS

TENNESSEE PUBLIC SCHOOLS WILL BE EQUIPPED TO SERVE THE ACADEMIC AND NON-ACADEMIC NEEDS OF ALL STUDENTS IN THEIR CAREER PATHWAYS



EDUCATORS

TENNESSEE WILL SET A NEW PATH FOR THE EDUCATION PROFESSION AND BE THE TOP STATE IN WHICH TO BECOME AND REMAIN A TEACHER AND LEADER FOR ALL



Agenda

- Meeting Norms
- 2023-24 IDEA Checklists
- ePlan 101
- Consolidated Funding Application (CFA)
 - Highlights
 - Best Practices
 - Common Mistakes
- Networking
- Important Dates and Reminders
- Contacts and Last Thoughts
- Questions and Survey





Norms and Expectations

- Take calls and necessary phone communications outside of the session room.
- Remain engaged.
- Visit a team member at the registration table if you have questions about the conference.
- All session slide decks are available in ePlan > TDOE Resources > Federal Programs and Oversight (FPO) > Federal Programs Professional Development > 2023 Federal Programs Institute.

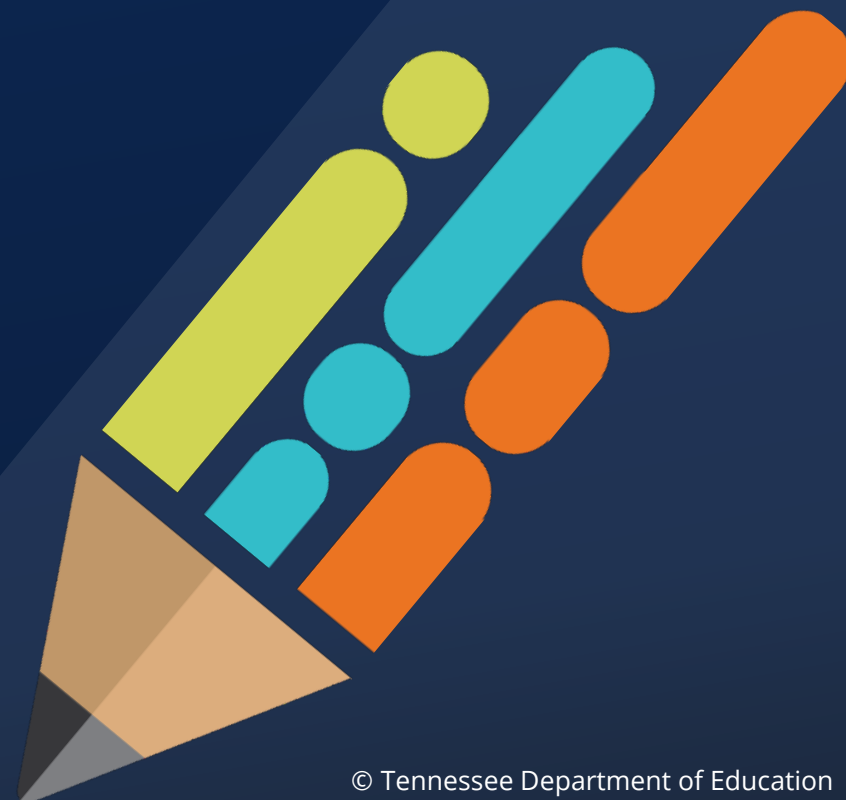


2023-24 IDEA Checklists

- Please refer to the attachments:
 - **2023-24 Monthly Checklist:** This is a great document to use as a monthly resource for upcoming due dates and reports that need to be completed.
 - **Quarterly Checklist:** These are broken down by quarters for a closer look into what is due by the 4 quarters.



ePlan 101



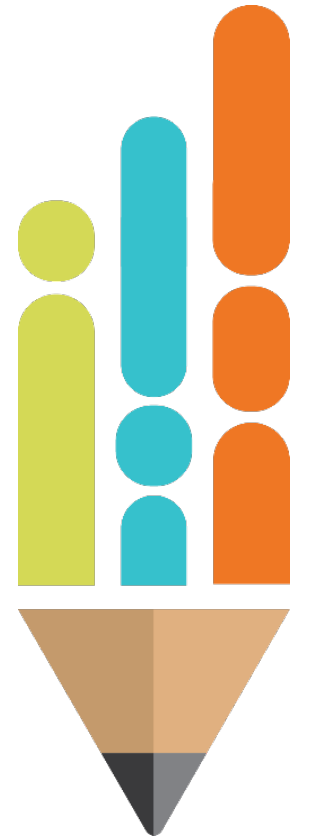
ePlan 101 Overview

▪ LEA Document Library

- Only available for viewing when signed into ePlan
- Contains:
 - LEA-specific documents
 - IDEA grant award letters and documents

▪ TDOE Resources

- Available for public viewing
- Contains:
 - Regional Consultants LEA Assignments
 - ESSA/IDEA Consolidated Funding Application (CFA) Reference Documents
 - ESSA/IDEA Non-public/Private Schools Information & Documents
 - ePlan User Access Form

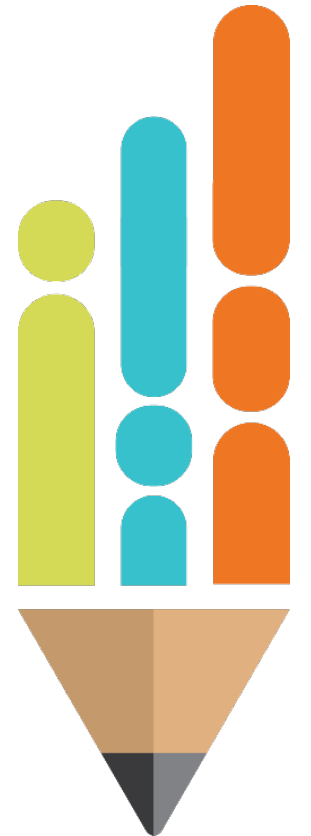


Consolidated Funding Application (CFA)



Consolidated Funding Application

- The CFA must be completed by each local educational agency (LEA) and includes funds awarded for the following:
 - Title I, Part A;
 - Title I, Part A Neglected;
 - Title I, Part D;
 - Title II, Part A;
 - Title III, Part A;
 - Title IV;
 - Title V, Part B; (Rural & Low-Income Schools); and
 - IDEA (Part B and Preschool).
- The CFA must be reviewed and approved by the Tennessee Department of Education (department).
- Access to the CFA is provided through the department's online funding and planning portal, ePlan (<https://ePlan.tn.gov>).





CFA Highlights

- **Budget Revisions**

- Additions, corrections, changes, or deletions for the CFA. LEAs may make as many revisions as necessary during the fiscal year to the budget.

- **Personnel Detail Pages**

- System-wide, 6–21, and 3–5 personnel detail pages to list all staff working with students with disabilities hired by the LEA. This does not include contracted personnel that are not directly hired employees.





CFA Highlights–Required Uploads

▪ Required Uploads

– State Special Education Expenditure Report (SSEER)

- The state Special Education Expenditure Report (SSEERs) provides financial expenditures for the instructional and related service needs of special education students from general purpose special education funds.

– Private Schools Services Evaluation

- Federal regulations require that a proportion of your federal funds be used to provide services to children with disabilities in private schools.





CFA Highlights—cont.

- **Maintenance of Effort (MOE)**

- MOE generally refers to a requirement placed upon many federally funded grant programs that the State Education Agency (SEA) and LEAs, demonstrate that the level of State and local funding remains constant from year to year.

- **Final Expenditure Report (FER)**

- Final expenses are completed by the LEA's fiscal department to finalize expenditures for the previous fiscal year.





CFA Best Practices

- Budget narratives **must** be specific enough to determine allowability of expenditures
 - How is it supplemental?
 - What items are being purchased?
 - How many items are being purchased?
 - What activities are being funded?
 - Who will participate in activities?
 - What students are being targeted for the service?
 - When will activities take place?
 - Are services being contracted? Through whom?





CFA Best Practices

- Over-estimate your full-time equivalents (FTEs) for educational assistants.
- Reference your CFA help pages in ePlan, CFA guide, and federal funds guide while completing your CFA.
- Check throughout the year to ensure MOE will be met by the budget end (June 30).





CFA Common Mistakes

- IDEA Personnel Chart FTEs not matching the budget narratives
- Budget narratives not detailed enough
- Incorrect budget lines:
 - equipment
 - supplies and materials





CFA Common Mistakes

- Misusing item lines 399, 499, and 599
- Putting teacher's/staff's actual names
- Identifying positions (titles) differently in different sections of the CFA (e.g., coach on personnel details and consulting teacher in the budget narrative description)



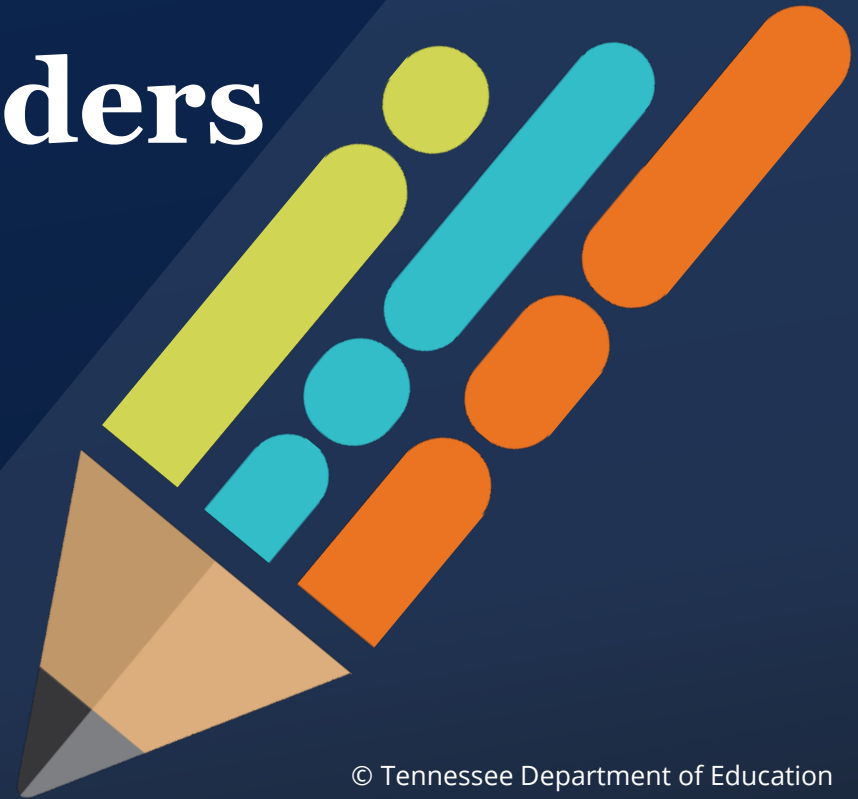


CFA Common Mistakes

- Contracted services now in 310, 311, and 312 instead of all being placed in 399.
- Putting specific amounts for Private School Proportionate Share (PSPS) in budget narrative descriptions.
- Using 72130 instead of 72220.
- Too much information in fringe benefits.



Important Dates & Reminders



Important Dates First Quarter

- **Monthly:** Time and Effort — Personnel Activity Reports (PARs)
- **Aug. 15:** Final Expenditure Report (FER)
- **Sept. 1:** SSEER, Private Proportionate Share Evaluation Reports, and Comprehensive Coordinated Early Intervening Services (CCEIS), if applicable
- **August to February:** Individualized Education Plan (IEP) file monitoring



Important Dates for the 2023-24 School Year

- **Nov. 1:** Final FY23 CFA Budget Approval
- **December:**
 - Private Schools Proportionate Amount Calculations
 - Semi-Annual Certifications
- **January:** Special Education Excess Cost Calculations
- **March:**
 - Attend an FPO CFA training for FY25
 - FY25 CFA opens
- **April:** Attend an FPO CFA work session for FY25
- **May 1:**
 - FY25 CFA due
 - Semi-annual certifications
- **June:** Finalize all FY24 budget revisions
- **July 1:** FY25 CFA must be approved by the department





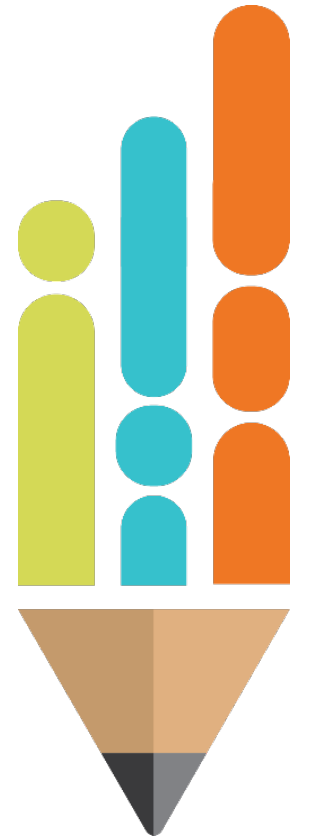
2023-24 New Directors Meetings

- Next New Directors Meetings:
 - January (virtual)
 - March (virtual)

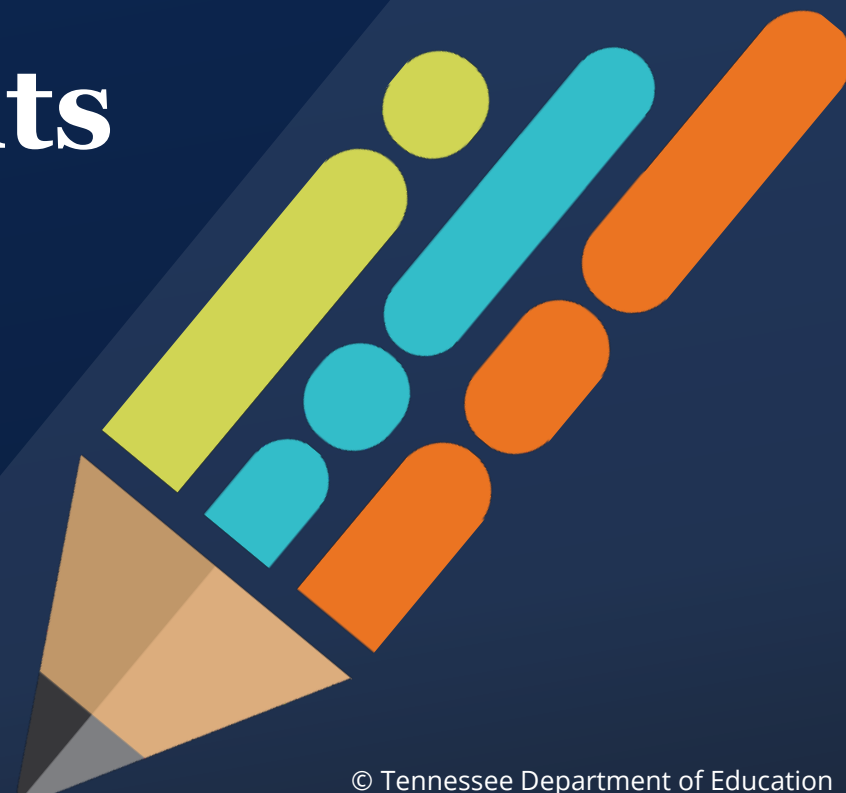


Reminders

- Monthly/quarterly IDEA director's meetings
- Carryover funds
- Time and Effort
- Department Updates—*Federal Programs Update, Special Education and Intervention Programs Update, Commissioner's Update for Directors*
- IEP file review monitoring (starts in August)

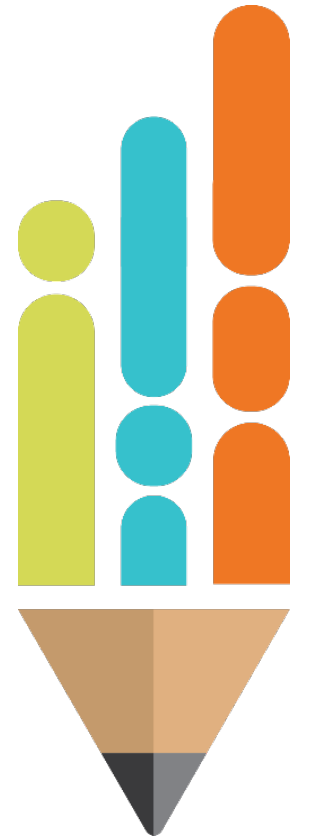


Contacts and Last Thoughts



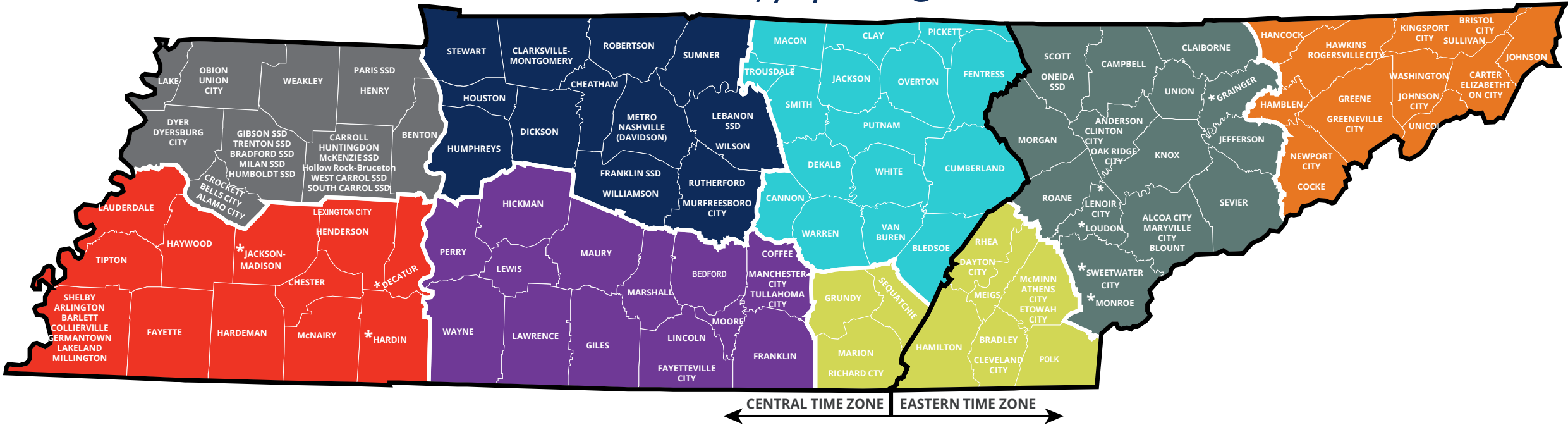
Closing Last Thoughts

- Find a veteran IDEA director in your area and develop a working relationship.
- Meet regularly with your LEA's federal programs director.
- Meet monthly with your LEA's bookkeeper.
- Sign-up for all newsletters that touch your work stream.
- Access your resources at the department (FPO coordinators, special populations specialist, fiscal consultant, CORE consultants, etc.).



Regional Finance Consultant District Map

As of 7/1/2023



Northwest	Southwest	Mid Cumberland	Upper Cumberland	South Central	Southeast	East TN	First TN
Joshua Dehnz	Holly Kellar	Rob Mynhier		Taffe Bishop		Jill Lewis	
Joshua.Dehnz@tn.gov	Holly.Kellar@tn.gov	Robert.Mynhier@tn.gov		Taffe.Bishop@tn.gov		Jill.Lewis@tn.gov	

*Districts that are assigned to a finance consultant in a different CORE region.



Thank You!

Questions?



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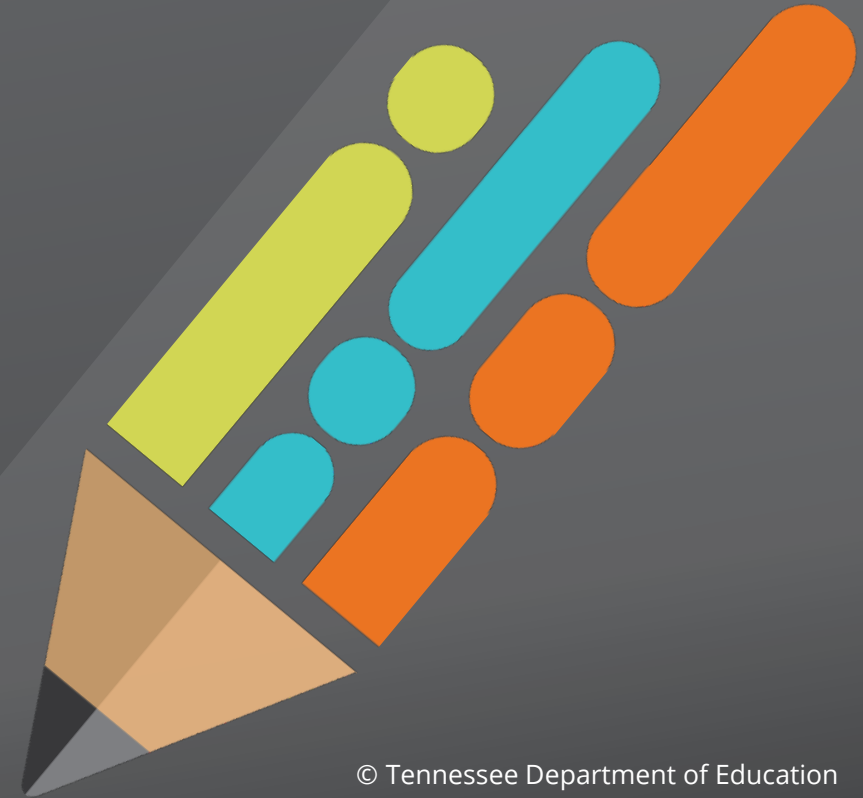


New IDEA Directors

Please Share Your Feedback:

You may access the PD by navigating here:

https://stateoftennessee.formstack.com/forms/2023fpi_pd_survey_newideadirectors



Fraud, Waste or Abuse

Citizens and agencies are encouraged to report fraud, waste, or abuse in State and Local government.

NOTICE: This agency is a recipient of taxpayer funding. If you observe an agency director or employee engaging in any activity which you consider to be illegal, improper or wasteful, please call the state Comptroller's toll-free Hotline:

1-800-232-5454

Notifications can also be submitted electronically at:

<http://www.comptroller.tn.gov/hotline>