

## **Special Education Report to the Board of Education**

**October 17, 2018**

This report is intended to provide transparent responses to questions raised by Board of Education members in June 2018 regarding special education staffing and the IDEA budget. The below responses are detailed in nature. Here is a summary of the responses to the primary questions:

- After the February 2017 Workbooks were released, 1,124 SEA hours (32.3 FTE equivalent) and 10.52 CC teachers were allocated out to schools to be responsive to additional needs for the 2017/18 school year. Local funding and Special Education IDEA Flowthrough funding was available to meet these needs.
- This year we changed the Special Education allocation process in order to solve for the 2017/18 school year concerns. We pushed the majority of our resources out early, in the February workbooks. While this left us with fewer special education resources to meet needs in August through October, we found that our new process worked much better and there were fewer needs after the school year started. At this point, we have enough local funding and Special Education Flowthrough to meet any new needs that might arise this year.
- In future budget years, as we spend down carryover, we will need to monitor our reliance on IDEA Flowthrough to ensure we have the funding available to meet the needs.

### **Changes during the 2017-18 school year.**

Several questions emerged about special education staffing changes during the 2017-18 school year and why the Board authorized budget of \$1M for special education didn't get spent. The attached chart (Appendix A) details the multiple special education staffing adjustments by school and date during the 2017-18 school year. As background information, the allocation strategy followed our typical student projection process: build in 3 to 5 additional students (depending on school size) to account for growth, apply the formula (rounded up), followed by hand adjustments to account for individual high needs students. Student Services reserved approximately 10 teacher and 20 SEA positions to meet subsequent staffing needs throughout the course of the school year. Additionally, Student Services developed a contingency plan if the locally funded resources were insufficient. The contingency plan was based on using \$650,000 of IDEA Flowthrough carryover funds. As discussed in the October 2017 Board meeting, the Board authorized \$1M would be utilized after the \$650,000 carryover was spent. Beginning on October 31, 2017, 21 different allocation adjustments were made across the district using IDEA Flowthrough funds totaling \$374,408.62. (Appendix A)

When additional resource requests were submitted to the Department of Student Services after the October 2017 Board meeting, the administrative team reviewed those requests with school leadership to discuss the concerns and determine appropriate solutions. Those solutions either resulted in distributing more resources or deploying central office staff to consult and

problem solve with school personnel around needs of specific students. Resources were never denied to students or schools in need due to ‘running out.’

**Summary of Special Education Adjustments during the 2017-18 School Year**

<b>Time Period</b>	<b>Funding Source</b>	<b>Special Education Assistant (SEA)</b>	<b>Special Education Teacher</b>
February 22 – June 15, 2017	Local	129.01 hours (equivalent to 3.7 FTE)	1.02 FTE
July 1 – October 3, 2017	Local	+555.5 hours (equivalent to 16 FTE)	6.0 FTE
<b>October 31, 2017 – March 2, 2018</b>	<b>IDEA Flowthrough</b>	<b>+439.5 hours (equivalent to 12.6 FTE)</b>	<b>3.5 FTE</b>

**Strategy for the 2018-19 school year.**

In our preliminary work with Educational Resource Strategies (ERS), we wanted to address several key issues for the 2018-19 school year to avoid the 2017 concerns: (1) reduce the number of small staffing adjustments in the fall semester, (2) start the year fully staffed with special education teachers and (3) reduce the number of provisionally certified special education teachers. To accomplish these goals, we increased school allocations by taking student projections and building in 5 – 10 additional students (depending on school size) to account for growth, apply the formula (including rounding up), followed by hand adjustments to account for individual high needs students. The increased school allocations successfully created service delivery options which can accommodate more students throughout the year. Allocating heavier resources on the front end has greatly reduced the number of school requests for additional allocation and has worked this year in that it allowed assistant directors/PSTs to focus more on improving instruction and student programs. An additional benefit of this strategy is that principals were able to hire teachers in the spring/early summer. As we began the Welcome Back Week, *all* special education teacher positions were filled, the first time in several years.

Allocating nearly all of the locally funded special education positions up front and not holding reserve positions (10.0 teacher and multiple SEA) has risks. However, this risk was mitigated by: (1) transferring staff from school with excess resources and (2) an increased planned carryover of IDEA Flowthrough (approximately \$2M) from which we could make strategic adjustments. While we feel confident we have the resources needed this year, we will need to carefully account for the drawdown of Flowthrough dollars and tighten constraints on fund 10 revenue as we enter the 2020-21 school-year. Historically, we have maintained about \$1M in carryover to provide flexibility in responding to additional staffing or out of district placements. The last two years we have carried over approximately \$2M however, for the 2019-20 school year, this amount is projected to be \$640,000. Please see Appendix B for details on the IDEA Flowthrough Grant and changes in carryover from year to year.

**IDEA Flowthrough Budget: Annual Award, Positions, Carryover and Total Amount**

<b>IDEA Flowthrough</b>	<b>Fiscal Year 2017</b>	<b>Fiscal Year 2018</b>	<b>Fiscal Year 2019</b>	<b>Fiscal Year 2020</b>
<b>Annual Award</b>	\$5,896,662.00	\$5,826,222.00	\$5,954,241.00	\$5,954,241.00

Flowthrough Funded Positions	\$56,453.46	\$374,408.62	\$800,000 - 900,000 (projected)	
Carryover	\$1,251,110.00	\$2,274,039.00	\$2,025,397.00	\$640,102.75
Total	\$7,147,772.00	\$8,100,261.00	\$7,979,638.00	\$6,594,343.75

**IDEA Flowthrough Grant (341)**

A Board member asked how the district uses its IDEA Flowthrough budget and what broad categories this funding supports. The Madison Metropolitan School District receives an annual IDEA Flowthrough Grant (sometimes referred to as the 341 grant) of approximately \$5.85 M. This grant is specifically provided to school districts to account for the excess cost of special education programs/services. Appendix B captures a high level overview of how these resources are spent. Major categories include assessments, personnel, professional development, supplies/materials/curriculum, extended school year, accessibility and operational/programming costs.

The 2018-19 tab of Appendix A details the multiple special education staffing adjustments prior to and during the 2018-19 school year.

**Time Limited Resources.**

In response to situational or short-term staffing needs, the Department of Student Services offers time-limited educational assistants (T-LEA), Special Education Assistants (T-LSEA) and at time special education teachers to support schools. Generally, these time-limited resources are authorized for 4 weeks with the option to extend to 7. During this time, the Assistant Director works closely with the Principal to adjust the service delivery/staff schedules to accommodate a new student or programmatic adjustments. The goal is to rearrange internal staffing to meet all student needs. When this is not possible, longer-term resources are made available. The following chart (Appendix C) provides a month by month use of time limited resources by level over the last six years. Generally speaking the use of time-limited resources is heavier at the beginning, reaches a low at the midpoint and slightly increases towards the end of the year.

**Transition Project.**

A Board member raised the question about what innovative and proactive strategies can be used to support schools in organizing their resources in the most effective way to avert some of the issues we faced last year. During the summer of 2018, the Department of Student Services funded a \$100,000 project to support the transition of students with disabilities. Student Services sought special education teams to work the week prior their contract (Welcome Back week) to: contact all parents/families, create IEPs at a glance, complete the service delivery part B process, complete staff/student schedules, create participation plans and complete various professional learning trainings/orientations. Doing so allowed each special educator to orient their team teaching partners and SEAs during the Welcome Back week. Preliminary quantitative and qualitative data suggests the 12 schools who participated in this voluntary project experienced a dramatically better start of the school year. Our intent is to expand this for next year as we continue to improve opportunities for both staff and students. Long-term, we are trying to better

understand the cost-benefit analysis of having special education teachers' work longer contracts (3, 4, or 5 days more).

### **Maintenance of Effort**

Board of Education members also had questions about Maintenance of Effort (What is it? and How does this impact MMSD decisions?). Maintenance of Effort often shortened to "MOE," refers to the requirement placed upon many federally funded grant programs that the State Education Agency (SEA) and Local Education Agencies (LEA) demonstrate that the level of local and state funding remains relatively constant from year to year. Failure to meet MOE requirements may result in the LEA losing eligibility to receive IDEA entitlement funding and requiring an LEA to repay funds, using a non-federal source, to the SEA, who is required to send funds to the US Department of Education. At the local level, the Individual's with Disabilities Education Act (IDEA) requires that LEAs expend the *same amount of local and state funding* for special education and related services as it expended in the previous fiscal year (34 CFR §300.203). The intent of this federal provision is to prevent districts from balancing their budgets at the expense of special education programs and services. There are a limited number of provisions in IDEA to allow for decreases in an LEA's MOE from one fiscal year to the next (e.g., student enrollments decrease would allow the district to reduce the effort or amount of expenditure). The Department of Public Instruction monitors every LEA in Wisconsin every year regarding IDEA MOE compliance. The MMSD has continued to meet the MOE provision.

**[IDEA MOE Guide Updated for WISEgrants](#)**