



Proportionate Share and the FY23 October 1 Data Collection

ESS Program Management

November 1, 2022



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Agenda

- Why Does Arizona Count Private School Students?
 - Meaningful Consultation
- How Does Arizona Collect the Data?
 - October 1 Data Collection
- What Happens with the Data?
 - Proportionate Share Calculations
- How Do Districts Report Proportionate Share Activities?
 - Budgets
 - Completion Reports





Why Does Arizona Count Private School Students?



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IDEA Equitable Services for Students with Disabilities Enrolled by Their Parents in Private Schools

- Public education agencies (PEAs, in this case public school districts) have an obligation to locate and evaluate students with disabilities enrolled by their parents in private schools located within the PEA's boundaries, or those who are homeschooled.
- PEAs must submit the count of parentally-placed private school (PPPS) students through the October 1 Data Collection.
- The overall PPPS student count is used to calculate a proportionate share of federal special education (IDEA Consolidated-Entitlement) grant funds to provide special education services for these students.

[34 CFR §§ 300.130 - 300.144](#)



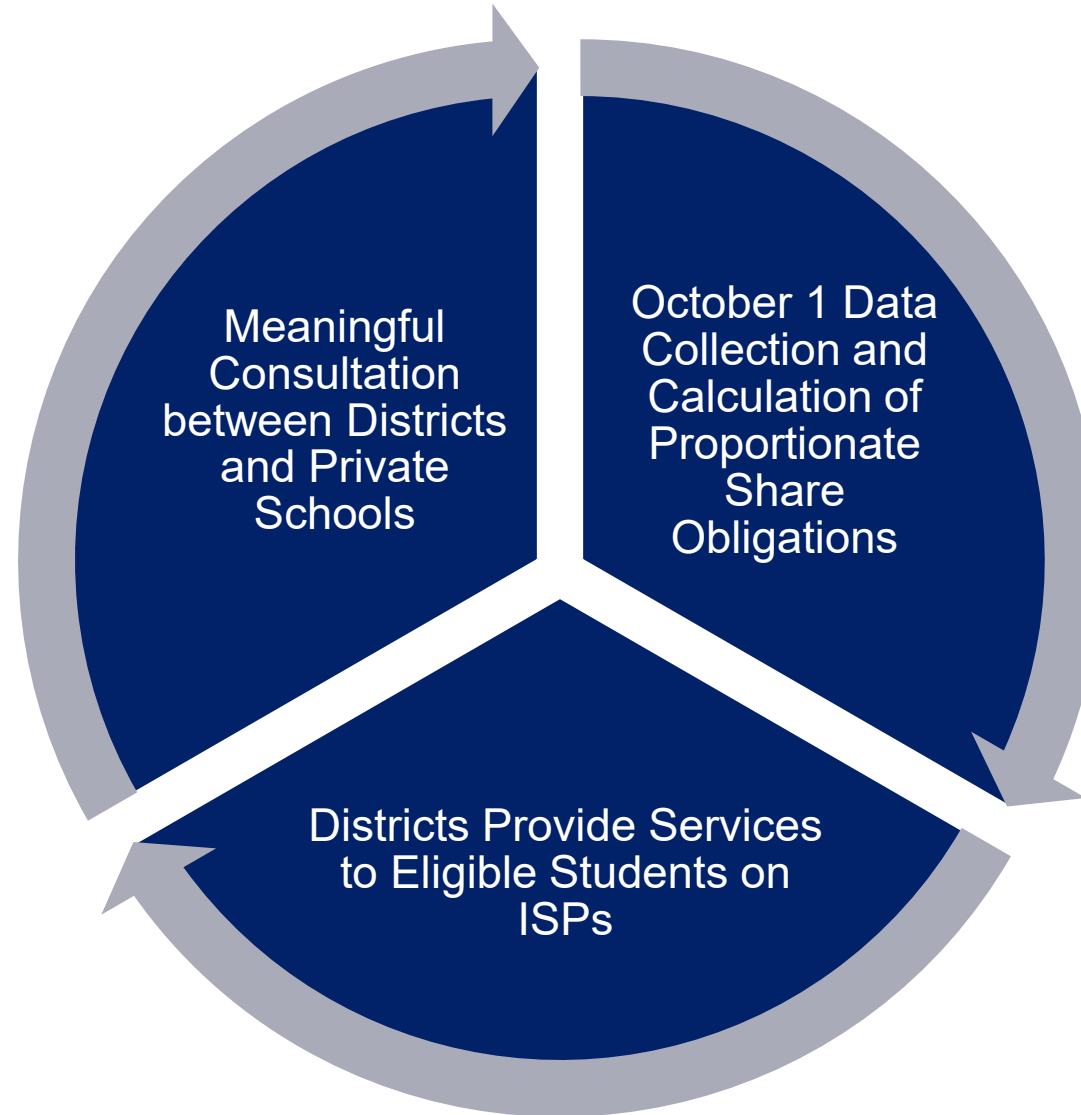
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What are “equitable services” as applied to parentally-placed private school children with disabilities?

- Equitable services are special education and related services, including direct services, provided to parentally-placed private school children with disabilities in accordance with the provisions of IDEA and its implementing regulations in 34 CFR §§ 300.130 through 300.144.
- Under IDEA, LEAs have an obligation to provide parentally-placed private school children with disabilities an opportunity to participate in the services funded with IDEA Part B funds. After timely and meaningful consultation, the LEA must make available services to those parentally-placed private school children with disabilities that have been designated to receive equitable services.
- No parentally-placed private school child with a disability has an individual right to receive some or all of the special education and related services that the child would receive if enrolled in a public school.



Proportionate Share in Arizona

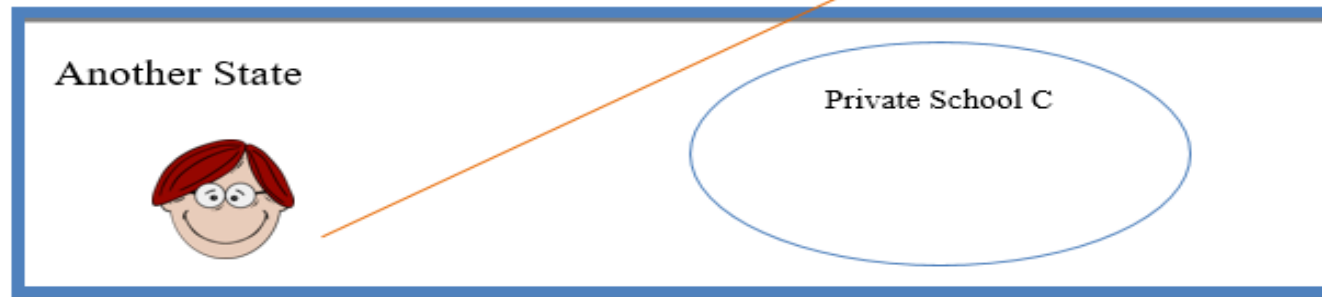
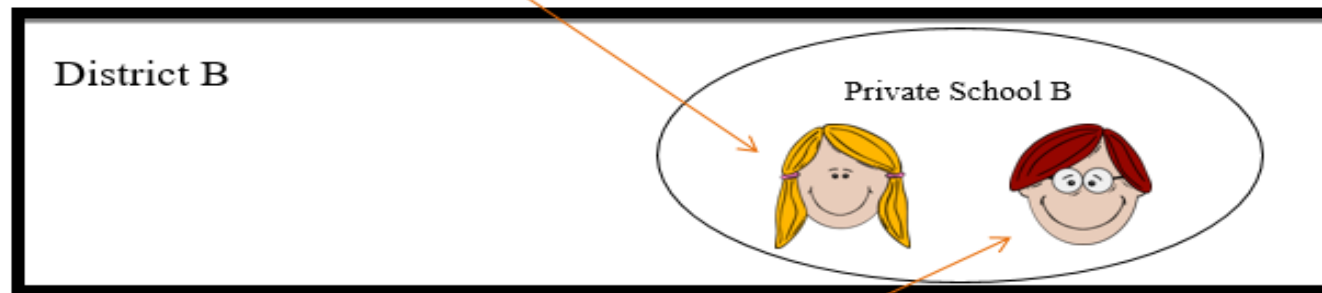
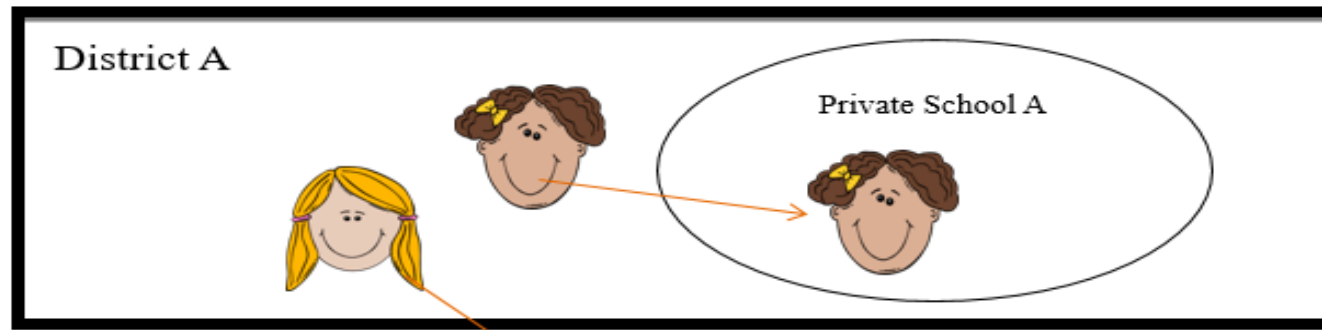


Which Students and Schools Do We Count?

- Parentally-placed students as of October 1
 - All students (general education and SPED)
 - Ages 3 – 21
 - Attending K-12 at a non-profit, private elementary or secondary schools (including homeschools)
 - Within the school district's boundaries
 - Overlapping boundaries – report only grades served
 - Elementary School Districts report K-8
 - Union High School Districts report 9-12
 - Unified School Districts report K-12
 - Include Empowerment Scholarship Account Students on SPED eligible counts



How to Tell Which District is Responsible



© [Massachusetts Department of Elementary and Secondary Education](#)



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Who Are the Eligible Children?

In Arizona, parentally-placed private school (PPPS) students refers to any students placed by their parents in:

- A non-profit, elementary or secondary school
- A homeschool program
- Only count students in Kindergarten through 12th grade
- This does not include children placed by the district at a private school

Parentally-placed private school children with disabilities

Parentally-placed private school children with disabilities means children with disabilities enrolled by their parents in private, including religious, schools or facilities **that meet the definition of elementary school** in 34 CFR § 300.13 or **secondary school** in 34 CFR § 300.36, other than children with disabilities covered under CFR § 300.145 through CFR § 300.147.



Empowerment Scholarship Account (ESA) Students

ESA Special Needs Eligibility Requirements are different than SPED eligibility requirements in a public school setting.

The ESA Program determines the student Special Needs Eligible if the student has a **current MET/Evaluation Report** or Individualized Education Program (**IEP**) or **504 Plan** from an Arizona public school.

ESA students with **504 plans should not be counted** in the parentally-placed private school counts for SPED eligible children, not eligible for equitable services.

ESA students that have been determined eligible for special education by a public school district or charter school and have current MET are eligible for equitable services and should be included in the ODC.



Which Students Must Districts Count and Report on the October 1 Data Collection?

Number of All Enrolled Students in Private Schools and Homeschools	<ul style="list-style-type: none">• Only report based on grades served by public school district, K-12, K-8, or 9-12
Number of SPED Eligible Private School/ Homeschool Students	<ul style="list-style-type: none">• Only report students with current evaluation from District or Charter School
Number of SPED Eligible Private School/ Homeschool Kindergarten Students	<ul style="list-style-type: none">• Only report students ages, 3-5, attending Kindergarten and SPED Eligible





Meaningful Consultation



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Requirements Under Child Find

Guide Steps from ESS Program Support and Monitoring

Section I: Child Find AZ Find website



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SECTION I: Child Find	
I.A.1 Child Find Requirements	
300.111(a)(1)(i) AF, SCAF	<p>Determine whether the PEA has board-approved special education policies and procedures to ensure that all children with disabilities who are in need of special education and related services are identified, located, and evaluated.</p> <p>PEA board-approved policies and procedures must include information related to equitable participation and accurate child count for parentally, privately placed and home-school children.</p> <p>PEA board-approved policies and procedures should be unique and individualized to the PEA and should not be a replication of the applicable statutes. PEA board-approved policies and procedures should be comprehensive and include all requirements under the Individuals with Disabilities Act (IDEA).</p> <p>Agency Review Method: Verify that the current PEA's board-approved policies and procedures are current and reflect the requirements in IDEA, state statute, and board rule.</p> <p><i>Policies</i> are an outline of the requirements in accordance with federal and state requirements.</p> <p><i>Procedures</i> explain how the PEA will carry out the policies and delineates who is responsible.</p> <p>Note: Both policies and procedures must be present and show evidence of board approval in order for this item to be considered in compliance. Checklists to assist in ensuring a policy for all requirements are included can be found under Resources on the Program Support and Monitoring webpage.</p>
R7-2-401.D.1 R7-2-401.B.3 AF, SCAF	<p>Determine whether child find procedures have been made available, either electronically or in writing, to parents within the PEA's boundaries of responsibility, including parents of children with disabilities who attend private schools and home schools. This is a requirement for all PEAs.</p> <p>Agency Review Method: Review available documentation such as a letter, flyer, web page, link, or other means of documentation. If parents have been made aware of procedures via the available documentation, mark this item I.</p>
R7-2-401.C.1 R7-2-401.B.3 R7-2-401.D AF, SCAF	<p>Determine whether the required child find procedures for birth to 2.9 years were followed. This is a requirement for all PEAs.</p> <p>Required procedures include:</p> <ul style="list-style-type: none">A. Use of the mandatory AzEIP (child find) referral form and timelines (can be found on the AZ Find webpage and/or Appendix C).B. Documentation of appropriate follow-up on any referral to AzEIP or the school district.C. Alert forwarded to ADE/ESS Early Childhood Special Education (ECSE) when no follow-up on a referral can be documented.

Timely and Meaningful Consultation

- Occurs prior to other required activities throughout the year
- Responsibility is on the public school district to initiate consultation with private schools and home school representatives
- Collaborative decision making & communication process
- Required topics:
 - Child find attending the private school in the district
 - Determination of Proportionate Share for the whole pool of eligible students attending private school in the district
 - The consultation process, methodology, and schedule for the school year
 - Determination of services and their method(s) of provision for the whole pool of students
 - Written Explanation procedures



Best Practice for Meaningful Consultation

- Consultation is ongoing throughout the year, as necessary. Districts will reach out regularly to private schools and homeschool parents.
- It is recommended to meet at least, the beginning, middle, and end of the school year.
- The public school district must document its consultation and outreach efforts:
 - The dates of attempts to participate in the consultation process,
 - The nature of the attempts, and
 - The results of each attempt for consultation.



Common Consultation Questions

Are all private schools in the district's boundaries invited to the same consultation meeting?

This is not required. Meetings are ongoing and scheduled throughout the year. There can be as many separate meetings as desired, or there could be one large meeting for all each time you meet. This is the school district's decision.

Are the home school parents invited to the same timely and meaningful consultation as the private school representatives and parents?

Home school parents may be invited to the same consultation meeting or the district may convene separate meetings.



Written Affirmation

Anytime meaningful consultation occurs, public school district obtains written affirmation of the consultation from meeting participants.

Written affirmation does not indicate “agreement” but merely that the meeting and discussion took place, so it must be signed at the conclusion of the meeting or as soon as possible thereafter.

Attachment C: Sample Written Affirmation

Sample Form: This is provided solely as an exemplar.

Written Affirmation of Consultation with Private School Representatives concerning Special Education Services

I hereby affirm that I was invited to and participated in the private/parochial school providers' consultation meeting sponsored by (SCHOOL DISTRICT) and held on (DATE) in accordance with the requirements of the Individuals with Disabilities Education Act (IDEA). During the course of the consultation, the following issues were discussed:



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Written Explanation

- Once timely and meaningful consultation meetings have taken place with all relevant parties, the school district will make a final decision about which services to provide and for which students.
- If the district disagrees with the views of the private school officials on the provision of services or the types of services (whether provided directly or through a contract), the district will provide to the private school officials a written explanation of the reasons why the district chose not to provide services directly or through a contract. 34 CFR § 300.134 (e)
- The public school district has the final decision-making authority. 34 CFR § 300.137(b)(2)



Child Find versus Child Count

Child Find: 34 CFR § 300.131

- Ongoing throughout the year
- Similar to the activities for public school children
- ***Should include explicit outreach to private schools, parents, and parents of home school in the district.***
- Determines children you may provide services to throughout the year
- Only for private schools within your district boundaries

Child Count: 34 CFR § 300.133

- Happens once a year, reported during Phase I of October Data Collection
- Determines the number of students to include for the proportionate share calculation submitted in the subsequent year IDEA grant applications (Basic, Preschool)
- Review September 2022 ESS Data Management [Training Video](#)





It's never too late!

If learning is hard for you, you're not the **only one**. We have programs that can help you. And it's completely confidential.

Talk with your school principal or a trusted teacher today.
You can also contact _____ for help.

FOR MORE INFORMATION, VISIT
[AZED.gov/SpecialEducation/Parents/AZ-Find](https://azed.gov/SpecialEducation/Parents/AZ-Find)



Screening and evaluation services are free and confidential.

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We help all children **succeed.**

Does your child have trouble achieving milestones in one or more of the following developmental or academic areas?

- Vision and Hearing
- Cognitive or Academic Skills
- Motor Control or Coordination
- Speech or Communication Skills
- Behavior or Social Skills

FOR MORE INFORMATION, VISIT
[AZED.gov/SpecialEducation/Parents/AZ-Find](https://azed.gov/SpecialEducation/Parents/AZ-Find)



Screening and evaluation services are free and confidential. Contact your child's teacher or the school principal for more information.

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AZ Find - Schools

AZ Find website

Child find applies to children who are:

- Suspected of having a disability even though they are advancing from grade to grade
- Highly mobile, such as migrant and homeless
- Wards of the state
- Private school students
- Homeschool students

Public Awareness Ideas



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Child Find Sample – Verification of Eligibility for Districts

- Evaluations cannot be charged to Proportionate Share Obligation
- IDEA Basic or Preschool (Kindergarteners up to age 5) funds may be used for Child Find under normal IDEA Activities
- Private school indicates one eligible student enrolled at their school
- Ask private school if they have documentation of eligibility
- Private school will need a release from parents to share with you.
- If private school gives you parent contact information, you can contact parents directly.
- Ask parent to share current IEP, evaluations, etc.
- Review documents provided. See if additional evaluations are needed.
- If there is no documentation, treat this like a referral for evaluation.





How Does Arizona Collect the Data?



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How to Obtain the Count?

- Private Schools
 - AZ Find/Child Find Activities and Resources
 - <http://www.azed.gov/specialeducation/az-find>
 - The National Center for Education Statistics
 - <http://nces.ed.gov/surveys/pss/privateschoolsearch>
 - Profit Status
 - <https://ecorp.azcc.gov/EntitySearch/Index>
- Homeschools
 - Contact County School Superintendent's Office
 - <http://www.azed.gov/adeinfo/cesa>



How to Report Parentally-Placed Students

Reporting Parentally Placed Students as of October 1 (Public School District Only)

Public school districts with a geographic boundary must report the number of students that are parentally placed private school children as defined by the IDEA.

Only count students in kindergarten through 12th grade, DO NOT include preschool students in the counts below.

Include Parentally placed students enrolled in:

- ☐ Private nonprofit schools located within the district's geographic boundaries:
- ☐ Institutional day schools
 - ☐ Residential schools
 - ☐ Homeschooled

Section 1: Report total enrollment of parentally placed private school students within your district's geographic boundary. Note: Public Education Agencies (PEA) with overlapping geographic boundaries, only report grades offered by your PEA (K-12, K-8, 9-12, etc.).

Section 2: Of the students reported in section 1, report only the number of students that are eligible children with disabilities in K-12. Note: Eligible children with disabilities means the student has a current special education evaluation from a PEA. Please visit the [Proportionate Share/Equitable Services FAQ](#) page for more information.

Section 3: Of the students reported in section 2, report only the number of kindergarten students (aged 5 and under) that are eligible children with disabilities.

Figure 3: Parentally Placed Students Data Entry

Parentally Placed Students as of October 1, 2022	
Public school districts with a geographic boundary must report the number of students that are parentally placed private school children as defined by the IDEA.	
Section 1: Report total enrollment of parentally placed private school students within your district's geographic boundary.	
Section 2: Of the students reported in section 1, report only the number of students that are eligible children with disabilities in K-12.	
Section 3: Of the students reported in section 2, report only the number of kindergarten students (aged 5 and under) that are eligible children with disabilities.	

Students on an Individual Service Plan (ISP) may be counted up to four times:

- Students with an ISP should be counted in the PEAs October 1 Count
- Students with an ISP should be counted in Section 1 of Parentally Placed Students as of October 1
- Students with an ISP should be counted in Section 2 of the Parentally Placed Students as of October 1
- Students with an ISP aged 5 and under and in kindergarten with an ISP should be reported in section 3 of the Parentally Placed Students as of October 1

Located on the ESS Data Management website

October 1 Data Collection

September 2022 ESS Operations Webinar Video



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Report ALL Parentally Placed Students

Reporting Parentally Placed Students as of October 1 (Public School District Only)

Public school districts with a geographic boundary must report the number of students that are parentally placed private school children as defined by the IDEA.

Only count students in kindergarten through 12th grade, DO NOT include preschool students in the counts below.

Include Parentally placed students enrolled in:

- ☐ Private nonprofit schools located within the district's geographic boundaries:
- ☐ Institutional day schools
 - ☐ Residential schools
 - ☐ Homeschooled

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Section 1: Report total enrollment of parentally placed private school students within your district's geographic boundary. Note: Public Education Agencies (PEA) with overlapping geographic boundaries, only report grades offered by your PEA (K-12, K-8, 9-12, etc.).



Determined Eligible for SPED Services

45

Section 2: Of the students reported in section 1, report only the number of students that are eligible children with disabilities in K-12. Note: Eligible children with disabilities means the student has a current special education evaluation from a PEA. Please visit the [Proportionate Share/Equitable Services FAQ](#) page for more information.

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Section 3: Of the students reported in section 2, report only the number of kindergarten students (aged 5 and under) that are eligible children with disabilities.



How to Submit Your Count

Census Verification Count

Verification of the annual child count is required for all PEAs pursuant to 34 CFR § 300.645(c).

The verification count submission should reflect the number of students with disabilities who were ages 3–21 with current evaluations, Individual Education Programs (IEPs) or Individual Service Plans (ISPs), and were receiving special education (SPED) services in your public education agency (PEA) on October 1 of the current reporting year. Students whose re-evaluations and/or IEP reviews were past due should be included, as long as these students continued to receive services on October 1.

ADE reports October 1 SPED counts that are extracted from AzEDS to the Office of Special Education Programs (OSEP) in Washington, D.C., therefore it is imperative that PEAs ensure that final counts extracted from AzEDS during Phase II (reconciliation) match the counts as verified in the verification count submission.

The final extracted count is used to determine base funding for all PEAs, and adjustments for new or expanding charter schools for Federal Part B allocations under the Individuals with Disabilities Act (IDEA).

Please see Verification and Reconciliation Instructions for complete details.

Special education students served on October 1, 2021 Required for districts, charter schools, secure care facilities, and state institutions

Total number of 3-21 year old students:

Note: This count is applicable to all PEAs and should include all students enrolled in Preschool through grade 12 receiving special education and related services over the October 1 child count date.

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Parentally Placed Students as of October 1, 2021 Required for districts only (not applicable to charter schools, secure care facilities, and state institutions) Preschool students, regardless of age, should be excluded.

Total enrollment of parentally-placed students in private non-profit institutional day schools, residential schools, or are home schooled (ages 3-21) served by a K-12 school as defined by elementary/secondary grades within your district boundaries:

Note: This count should include ALL students enrolled, not SPED only, that are placed in private non-profit institutional day schools, residential schools, or are home schooled.

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Number of parentally-placed eligible students with disabilities in private non-profit institutional day schools, residential schools, or are home schooled (ages 3-21) served by a K-12 school as defined by elementary/secondary grades within your district boundaries:

Note: This count should be less than or equal to the total enrollment of parentally-placed students in private non-profit institutional day schools, residential schools, or are home schooled (ages 3-21).

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Number of parentally-placed eligible students with disabilities in private non-profit institutional day schools, residential schools, or are home schooled (ages 3-5) served by a K-12 school as defined by elementary/secondary grades within your district boundaries:

Note: This count should be less than or equal to the number of parentally-placed eligible students with disabilities in private non-profit institutional day schools, residential schools, or are homeschooled (ages 3-21).

5

Save

Cancel



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What Happens with the Data?



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How Does ESS PM Calculate the Proportionate Share Obligation?

ESS Program Management uses the data from the prior fiscal year's October 1 Data Collection to determine the proportionate share obligation.

Visit [ESS Program Management website](#) to view this the allocations for [FY2023](#).

Basic Formula used= $\text{IFERROR}(\frac{F3}{F3+H3},0)$

Fiscal Year	Entity ID	CTDS	Entity Name	Parentally Private Placed Student (PPPS) Count	PPPS SPED Eligible 3-21	PPPS SPED Eligible 3-5	SPED Enrolled Students 3-21	SPED Enrolled Students 3-5	3-21 Proportionate Share IDEA 611 (Basic)	3-5 Proportionate Share IDEA 619 (Preschool)
2020	4153	160256000	Mt. Humphrey Unified District	200	20	2	250	30	7.41%	6.25%

Entity ID	CTDS	Name	FY2021 Total Allocation to PEA - 611 (Basic)	Proportionate Share Obligation – 611 (Basic) How much has to be spent on Parentally Placed Private School Students	FY 2021 Total Allocation to PEA - 619 (Preschool)	Proportionate Share Obligation – 619 (Preschool) How much has to be spent on Parentally Placed Private School Students	Maximum Amount that can be used for CEIS (15%)
4153	160256000	Mt. Humphrey Unified District	\$ 400,000.00	\$ 29,629.63	\$ 15,000.00	\$ 937.50	\$ 62,250.00



Proportionate Share Obligations

2023 IDEA Preliminary			Updated on: 10/20/2022		Contact essprogmgmt@azed.gov for questions.				
						Proportionate Share Obligation - 611 How much has to be spent on Parentally Placed Private School Students		Proportionate Share Obligation - 619 How much has to be spent on Parentally Placed Private School Students	Maximum Amount that can be used for CEIS (15%)
Entity ID	CTDS	Name	Total Allocation to PEA - 611	Total Allocation to PEA - 619					
4289	070516000	Agua Fria Union High School District	\$ 1,413,521.30	\$ 18,561.39	\$ -	\$ -	\$ 212,028.20		
4280	070468000	Alhambra Elementary District	\$ 2,390,815.34	\$ 15,487.06	\$ 62,516.88	\$ -	\$ 367,999.83		
4406	100210000	Amphitheater Unified District	\$ 2,828,488.72	\$ 19,642.28	\$ 79,440.56	\$ 1,134.87	\$ 436,189.39		
4443	110243000	Apache Junction Unified District	\$ 792,599.01	\$ 17,230.41	\$ 26,163.33	\$ -	\$ 122,814.35		
4471	130231000	Ash Fork Joint Unified District	\$ 60,703.04	\$ 1,145.34	\$ 854.95	\$ 170.99	\$ 9,233.70		
4272	070444000	Avondale Elementary District	\$ 1,122,908.95	\$ 61,419.51	\$ 13,119.13	\$ 1,028.95	\$ 170,404.21		
4268	070431000	Balsz Elementary District	\$ 490,870.04	\$ 23,154.25	\$ 16,174.30	\$ -	\$ 76,056.65		
4397	090232000	Blue Ridge Unified School District No. 32	\$ 437,326.54	\$ 3,675.01	\$ 10,483.86	\$ -	\$ 67,171.56		
4269	070433000	Buckeye Elementary District	\$ 946,868.06	\$ 7,058.65	\$ 7,733.36	\$ -	\$ 143,190.21		
4284	070501000	Buckeye Union High School District	\$ 816,480.95	\$ 1,115.41	\$ -	\$ -	\$ 122,472.14		
4378	080415000	Bullhead City School District	\$ 499,361.41	\$ 1,595.40	\$ 10,244.62	\$ -	\$ 76,440.90		
4470	130228000	Camp Verde Unified District	\$ 365,933.81	\$ 9,934.85	\$ 18,607.10	\$ 2,791.07	\$ 57,681.14		
4282	070483000	Cartwright Elementary District	\$ 3,294,925.50	\$ 17,116.50	\$ 99,636.06	\$ -	\$ 509,184.23		
4446	110404000	Casa Grande Elementary District	\$ 1,247,942.54	\$ 10,187.29	\$ 28,244.21	\$ -	\$ 191,428.01		
4410	100216000	Catalina Foothills Unified District	\$ 919,222.57	\$ 3,962.17	\$ 12,503.33	\$ -	\$ 139,758.89		
4244	070293000	Cave Creek Unified District	\$ 912,897.40	\$ 58,932.48	\$ 21,609.57	\$ -	\$ 140,176.05		
4242	070280000	Chandler Unified District #80	\$ 7,173,839.31	\$ 45,796.75	\$ 169,421.17	\$ 1,126.97	\$ 1,101,489.07		
4474	130251000	Chino Valley Unified District	\$ 562,164.49	\$ 38,093.28	\$ 22,271.78	\$ -	\$ 87,665.44		
4370	080214000	Colorado City Unified District	\$ 186,266.48	\$ 15,362.18	\$ 17,443.46	\$ -	\$ 30,556.49		
4381	080502000	Colorado River Union High School District	\$ 378,228.89	\$ 1,518.99	\$ -	\$ -	\$ 56,734.33		
4479	130317000	Congress Elementary District	\$ 40,730.72	\$ 3,133.13	\$ 688.60	\$ -	\$ 6,212.90		
4442	110221000	Coolidge Unified District	\$ 471,382.47	\$ 1,335.36	\$ 15,800.40	\$ -	\$ 73,077.43		
4487	130406000	Cottonwood-Oak Creek Elementary District	\$ 410,780.00	\$ 29,563.71	\$ 14,130.89	\$ 2,472.91	\$ 63,736.63		
4263	070414000	Creighton Elementary District	\$ 1,441,755.06	\$ 36,674.21	\$ 60,777.18	\$ 1,860.53	\$ 225,379.84		



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IDEA Allocations and Proportionate Share data are posted at <https://bit.ly/FY2023PS>, updated on 10/20/2022.

Proportionate Share Percentages and Private School Counts

Proportionate Share 2023			Updated on 5/18/22								3-21	3-5
				Parentally Private Placed Student (PPPS)	PPPS SPED	PPPS SPED	SPED Enrolled	SPED Enrolled			Proportionate Share IDEA	Proportionate Share IDEA
Fiscal Year	Entity	CTDS	Entity Name	Count	Eligible 3-21	Eligible 3-5	Students 3-21	Students 3-5			611 (Basic)	611 (Preschool)
2022	4289	070516000	Agua Fria Union High School District	333	13	0	977	0			1.31%	0.00%
2022	4249	070363000	Aguila Elementary District	6	0	0	17	0			0.00%	0.00%
2022	4280	070468000	Alhambra Elementary District	447	8	0	1227	173			0.65%	0.00%
2022	4418	100351000	Altar Valley Elementary District	62	0	0	97	4			0.00%	0.00%
2022	4406	100210000	Amphitheater Unified District	1491	16	3	2288	207			0.69%	1.43%
2022	4443	110243000	Apache Junction Unified District	224	13	0	585	74			2.17%	0.00%
2022	4471	130231000	Ash Fork Joint Unified District	22	1	1	52	4			1.89%	20.00%
2022	4272	070444000	Avondale Elementary District	913	46	8	795	94			5.47%	7.84%
2022	4268	070431000	Balsz Elementary District	494	15	0	303	42			4.72%	0.00%
2022	4481	130326000	Beaver Creek Elementary District	37	0	0	91	7			0.00%	0.00%
2022	79226	020209000	Benson Unified School District	54	0	0	210	24			0.00%	0.00%
2022	4169	020202000	Bisbee Unified District	26	0	0	53	1			0.00%	0.00%
2022	4397	090232000	Blue Ridge Unified School District No. 32	279	2	0	236	27			0.84%	0.00%
2022	4269	070433000	Buckeye Elementary District	315	7	0	932	140			0.75%	0.00%
2022	4284	070501000	Buckeye Union High School District	197	1	0	731	0			0.14%	0.00%
2022	4378	080415000	Bullhead City School District	88	1	0	312	38			0.32%	0.00%
2022	4470	130228000	Camp Verde Unified District	272	6	3	215	17			2.71%	15.00%
2022	4282	070483000	Cartwright Elementary District	594	8	0	1532	217			0.52%	0.00%
2022	4446	110404000	Casa Grande Elementary District	513	8	0	972	124			0.82%	0.00%
2022	4410	100216000	Catalina Foothills Unified District	291	2	0	462	37			0.43%	0.00%
2022	4244	070293000	Cave Creek Unified District	817	53	0	768	50			6.46%	0.00%
2022	4242	070280000	Chandler Unified District #80	2768	31	3	4825	448			0.64%	0.67%
2022	4474	130251000	Chino Valley Unified District	313	33	0	454	64			6.78%	0.00%
2022	4486	130403000	Clarkdale-Jerome Elementary District	51	0	0	35	7			0.00%	0.00%
2022	4370	080214000	Colorado City Unified District	230	16	0	178	66			8.25%	0.00%
2022	4381	080502000	Colorado River Union High School District	12	1	0	248	0			0.40%	0.00%
2022	4479	130317000	Congress Elementary District	19	2	0	24	1			7.69%	0.00%



Use Case #1:

SPED Eligible K-12 = SPED Eligible K

Parentally Private Placed Student (PPPS) Count	PPPS SPED Eligible 3-21	PPPS SPED Eligible 3-5	SPED Enrolled Students 3-21	SPED Enrolled Students 3-5	3-21 Proportionate Share IDEA 611 (Basic)	3-5 Proportionate Share IDEA 619 (Preschool)
139	3	3	204	28	1.45%	9.68%
42	3	3	81	16	3.57%	15.79%
22	1	1	52	4	1.89%	20.00%
1	1	1	713	124	0.14%	0.80%
1	1	1	1361	162	0.07%	0.61%

In this example, the number of SPED eligible K-12 students is equal to the number of SPED eligible Kindergarten students.

ESS PM staff will contact the district to confirm that all SPED Eligible students were in fact Kindergarten students on the October 1 Data Collection.

If this report was incorrect, the PEA should contact Data Management to correct the count.



Use Case #2: High Percentages for IDEA 619 Preschool Grant

Parentally Private Placed Student (PPPS) Count	PPPS SPED Eligible 3-21	PPPS SPED Eligible 3-5	SPED Enrolled Students 3-21	SPED Enrolled Students 3-5	3-21 Proportionate Share IDEA 611 (Basic)	3-5 Proportionate Share IDEA 619 (Preschool)
29	6	2	26	3	18.75%	40.00%
19	4	2	107	4	3.60%	33.33%
938	62	19	491	76	11.21%	20.00%
22	1	1	52	4	1.89%	20.00%
200	19	7	245	33	7.20%	17.50%
8	3	1	55	5	5.17%	16.67%
42	3	3	81	16	3.57%	15.79%
272	6	3	215	17	2.71%	15.00%
139	3	3	204	28	1.45%	9.68%
913	46	8	795	94	5.47%	7.84%
737	33	21	1619	257	2.00%	7.55%
1228	65	4	392	52	14.22%	7.14%
59	6	2	408	36	1.45%	5.26%
2549	189	11	2129	208	8.15%	5.02%

In this example, the number of Kindergarten students in private school settings causes the district's IDEA Preschool Grant to direct a higher than average percentage of funds to equitable services. ESS PM staff will contact the district to confirm valid data.



Trends in the Data

Entity Name	2019	2020	2021	2022	Average	Trend
Total Private Schools Counted	59202	60487	65295	67365	63087.25	
	4566	4711	4634	4855	4691.5	
	3125	3251	3314	3336	3256.5	
	2804	2956	3623	2549	2983	
	2787	2616	3032	3444	2969.75	
	2732	2946	2526	2768	2743	
	1758	2023	2905	2966	2413	
	2355	1678	1916	3348	2324.25	
	1818	2042	2256	2355	2117.75	
	0	925	2995	3463	1845.75	
	1784	1815	1567	1676	1710.5	
	1715	1700	1727	1647	1697.25	
	1553	1530	1682	1905	1667.5	
	1103	1222	1445	1793	1390.75	
	1165	1268	1491	1491	1353.75	

ESS Program Management also reviews year over year trends in data reporting for both SPED counts and the overall count of parentally-placed private school students.

Parentally Private Placed Student (PPPS) Count	PPPS SPED Eligible 3-21	PPPS SPED Eligible 3-5	SPED Enrolled Students 3-21	SPED Enrolled Students 3-5	3-21 Proportionate Share IDEA 611 (Basic)	3-5 Proportionate Share IDEA 619 (Preschool)
3463	109	6	4398	504	2.42%	1.18%
2995	43	5	4396	505	0.97%	0.98%
925	34	2	3440	483	0.98%	0.41%
1412	24	0	4576	594	0.52%	0.00%





How Do Districts Report Proportionate Share Activities?



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What Are Equitable Services?

- Special education instruction or related services for privately-placed students with disabilities
- A public school district must spend a proportionate share of IDEA grant funds on eligible students attending private schools within the district's boundaries

[Children with Disabilities Enrolled by Their Parents in Private Schools,
34 CFR § 300.130-300.144](#)

[Questions and Answers on Serving Children with Disabilities Placed by Their Parents in Private Schools](#)



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My district has a Proportionate Share Obligation, how do I budget these funds?

	Function Code	Object Code	Project Time (FTE)	Quantity	Salary, Rental, or Unit Cost	Line Item Total
	1000 - Instruction	6300 - Purchased Professional Services ▾		1	\$19,258.60	\$19,258.60
Narrative Description						
\$19,258.60 = Proportionate Share Obligation						
\$19,258.60 = Proportionate Share to provide a contracted certified special education teacher that will service the parentally placed private school children with disabilities.						

- Identify in the budget narrative that your expenditure is for Proportionate Share.
- The budget narrative must reflect allowable costs.
- Ensure your entire obligation reflected in the budget (may use multiple narrative sections)
- PEAs **may** spend more than the required obligation with SEA Director approval



Each District Must Spend its Calculated IDEA Proportionate Share Amount

- Districts determine the services to provide to students.
- Districts must document expenditures and other activities related to IDEA and proportionate share.
- Funds are for the pool of eligible students. There is not an individual student entitlement nor an individual private school entitlement to funds (34 CFR. § 300.137). The decision of the provision of services, and for whom, is reached following the consultation process.
- IDEA funds are not given to the private school to use at its discretion. Nor can the LEA reimburse the private school for services rendered.
- Because private schools are not at any time receiving federal funds from the public school district, they are not subject to additional federal oversight as they would be if they received federal funds directly.
- The amount of available funds may change from year to year, depending on, among other things, whether there is carry-over from the previous year, a change in child count, a change in the IDEA grant, newly opened or closed schools, etc.
- Districts, in consultation with the private school representatives and parents can adjust services throughout the year.
- Any non-disposable items purchased with IDEA funds belong to the district, not the private school (34 CFR. § 300.144).
- State and local funds may only supplement the expenditures, not supplant them (34 CFR. §300.133(d)).



Is this an Allowable Cost for Proportionate Share?

Budget Request	Allowable	Unallowable
Supports for students without disabilities		✓
Direct Services	✓	
Special Education Evaluations		✓
Transportation	✓	
Consultation services for a student (e.g. Consult with an ABA)	✓	
Child Find Activities		✓
Supplies: instructional aides, software, kits for related service providers	✓	
Paying Salaries of private school staff for part of their regular duties		✓
Professional Development		✓
Assistive Technology	✓	
Remodeling or repairs of private schools		✓
Administrative Costs		✓



Arizona Does Not Offer Equitable Services for Preschool Students

Arizona does not offer free preschool to public school students, therefore there is no obligation to provide equitable services under Proportionate Share of the IDEA to preschool students with disabilities.

Private School Staff should connect the District with the parents to discuss options for FAPE for students in preschool programs, ages 3-5.



Review History Log for Proportionate Share

Dear IDEA Administrator,

Please review your district's obligation for proportionate share for the current fiscal year (FY22).

	IDEA Basic	IDEA Preschool
<div></div>		
FY2021 Proportionate Share Carryover	\$5,765.32	\$0
FY2022 Proportionate Share Obligation	\$52,762.30	\$0
Total	\$58,527.62	\$0

You may be required to complete a revision to ensure that your district has budgeted for its required proportionate share amount(s).

If your district has FY2021 proportionate share carryover obligation, you will need to create a budget narrative in a separate line item than the rest of the proportionate share amount(s).

Example Budget Narrative:

Proportionate Share: These funds will be used to pay for related services for homeschool/private school students. This amount is for the FY2021 proportionate share carryover obligation.

Any unspent FY2021 proportionate share carryover funds will be forfeited to the US Department of Education at the end of the project period, 9/30/2022, through the completion report adjustment page. The unspent FY2022s proportionate share funds will be carried over to the FY2023 IDEA Basic or Preschool grant through the Completion Report.

If you have any questions, please contact essprogmgmt@azed.gov.

Thank you: LEA Business Manager, LEA Authorized Representative, ESS Program Specialist

ESS Program
Management posts HL
Comments for all districts
with proportionate share
obligations.

Districts must ensure the
budget matches the total
obligation for each
revision of the grant.



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Completion Report Detailed Expenditure Reporting

CR Detailed Expenditure Reporting Instructions

The information below is to assist with the detailed reporting of the total amount of IDEA funds expended:

A. IDEA Project Activities (expenditures) - Amounts spent by the public education agency (PEA) to assist with the excess costs of providing special education and related services to students with disabilities (34 C.F.R. § 300.16 and 34 C.F.R. § 300.202) enrolled in the public education agency.

B. Coordinated Early Intervening Services (expenditures) - Coordinated Early Intervening Services (CEIS) can be no more than 15% of the total available funds under all IDEA funding sources and carries additional narrative data requirements under the CR Program Details. If the public education agency has set aside funds and has expended funds for this purpose, report the amount spent under the corresponding object and function codes that align with CEIS budget narratives.

C. Proportionate Share (expenditures) applies to districts only - IDEA funds are subject to the provision of services for children with disabilities parentally placed in private schools and/or home-schooled. Proportionate Share obligations and private school counts may be reviewed on the IDEA allocations workbook on the [ESS Program Management website](#). If the district did not expend the full proportionate share obligation for the fiscal year, it must indicate the amount it tends to carry over in the CR Program Details section.

Line Item		IDEA Project Activities - enrolled students (expenditures)	Coordinated Early Intervening Services (expenditures)	Proportionate Share (private/home schooled) Expenditures (Districts ONLY)	Total Expenditures - must match the regular expenditure page totals
Instruction 1000					
Salaries	6100	\$ 1,576,261.47	\$	\$	\$ 1,576,261.47
Employee Benefits	6200	\$ 551,135.36	\$	\$	\$ 551,135.36
Purchased Professional Services	6300	\$ 24,781.01	\$	\$ 12,029.39	\$ 36,810.40
Purchased Property Services	6400	\$	\$	\$	\$ 0.00
Other Purchased Services	6500	\$	\$	\$	\$ 0.00
Supplies	6600	\$	\$	\$	\$ 0.00
Other Expenses	6800	\$	\$	\$	\$ 0.00
Support Services 3400, 3300, 3600, 3700					

If the PEA spent funds on equitable services under Proportionate Share, the district will report those expenses under the Proportionate Share column (Basic and Preschool have separate pages).



CR Program Details

School Districts Only - Parentally Placed Private School Students

IDEA funds are subject to the provision of services for children with disabilities parentally placed in non-profit private elementary and secondary schools and/or home-schooled. Please review Proportionate Share Obligations in the 2022 IDEA Allocations Workbook.

9. Has the school district made child find procedures available, either electronically or in writing, to parents within the PEA's boundaries of responsibility, including parents of children with disabilities who attend private schools and home schools?

☐ Yes

☐ No

10. Describe the school district's process for meaningful consultation with private schools and home schools. Include the list of every entity you consulted with regardless of proportionate share expenditures.

11. What was the district's obligation for proportionate share for the following fiscal years?

Fiscal year 2021 Proportionate Share Carryover:

Fiscal year 2022 Proportionate Share Obligation:

Total Proportionate Share Obligation:

12. What activities (equitable services) were offered by the school district in fiscal year 2022?

13. If the district was unable to expend the total proportionate share obligation in fiscal year 2022, the PEA must indicate how much proportionate share funding will be carried over or forfeited.

Fiscal year 2021 Proportionate Share funds to forfeit:

Fiscal year 2022 Proportionate Share funds to carry over:

Districts must respond to questions on CR Program Details for proportionate share.

Describe the meaningful consultation process and provide names of private schools that participated.



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CR Adjustments Page

Go To ▶						
Grant	Allocation	Expenditures	Amount Remaining	Amount to Carry Over	Acknowledge Carryover Less Than Amount Eligible	Interest Earned
IDEA - Basic	\$474,063.65	\$263,859.50	\$210,204.15	203,730.95	<input checked="" type="checkbox"/>	0.00
IDEA - Preschool Grant	\$24,560.06	\$8,050.09	\$16,509.97	12,045.69	<input checked="" type="checkbox"/>	0.00

For districts with unspent 2021 carryover obligations, they will have to report forfeiture of funds through the Completion Report Adjustments page. Reduce the amount eligible for carryover by the amount to forfeit as reported on the CR Program Details section.



Tips for SPED Directors

- Keep a running record of students' evaluations

Student Name	Student ID	Date of Birth	Date of Last Evaluation	Days since	Valid Eval Date?	Private School	ISP	Last Date of Communication	Services
Pebbles Rubble	2389799	4/1/2015	8/1/2020	821	Yes	OLM Elementary	Yes	4/1/2022	Speech
Bam Bam Flintstone	3826549	6/1/2014	2/14/2021	624	Yes	Homeschool	Yes	3/31/2022	SDI
Elroy Jetson	2029083	7/15/2012	8/15/2017	1903	No	OLM Elementary	No	10/1/2020	None
Judy Jetson	5483816	9/30/2007	5/5/2020	909	Yes	OLM High	Yes	9/30/2022	PT

- Maintain documentation of consultation meetings and written affirmations
- Track equitable services provided and any supplies purchased with grant funds
- Contact ESS Data Management for assistance on reporting students in AzEDS



Tips for Business Managers

- Track of proportionate share obligations throughout the fiscal year.
 - See History Log for adjustments or carryover
- Maintain records of expenses charged toward proportionate share.
- Revise budgets if scope of work changes.



Resources

- Child Find
 - <http://www.azed.gov/specialeducation/az-find>
- Arizona Corporation Commission
 - ecorp.azcc.gov
- ESS Program Management
 - Website: <https://www.azed.gov/specialeducation/operations/>
 - FAQ: <https://www.azed.gov/specialeducation/program-management-proportionate-share/>
 - Inbox: essprogmgmt@azed.gov
- ESS Data Management
 - Website: <https://www.azed.gov/specialeducation/data-management>
 - Inbox: essdatamgmt@azed.gov
- OSEP Q&A
 - [Questions and Answers on Serving Children with Disabilities Placed by Their Parents in Private Schools \(PDF\)](#)





Contact Us

ESS Program Management web page:

www.azed.gov/specialeducation/operations

ESS Program Management e-mail address: essprogmngmt@azed.gov

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