

FY25 IDEA Part B Consolidated



ESS Program Management

February 13, 2024

Agenda

Purpose of the IDEA Grants

Planning a Budget

Timeline for PEAs

GME Funding Application Overview

Changes for Fiscal Year 2025

Budget Narrative Examples

Application Review Process

Questions and Answers

Please visit the [ESS Program Management web page](#) to download the [Allowable Costs Under the IDEA guide](#).

If you have questions during today's presentation, please use the Zoom chat or e-mail essprogmgmt@azed.gov.

Purpose of IDEA Part B Grants

To assist local and public education agencies (PEAs) in assuring that all children with disabilities (ages 3–21) have available to them a free appropriate public education that emphasizes special education and related services designed to meet their unique needs.

The funds under Part B may be used for the **excess cost** of providing special education services.

“Public education agency” means a school district, a charter school, an accommodation school, a state-supported institution, or any other political subdivision of this state that is responsible for providing education to children with disabilities. [A.R.S. § 15-761](#)

Excess Cost Requirements for IDEA

Excess costs are those costs for the education of an elementary school or secondary school student with a disability that are in excess of the average annual per student expenditure in a PEA during the preceding school year for an elementary or secondary school student. The PEA must spend at least the average annual per student expenditure on the education of an elementary school or secondary school child with a disability before funds under Part B of the Act are used to pay the excess costs for providing special education and related services.

Only allowable costs may be charged to the IDEA grants.

Excess Cost Requirements for IDEA (continued)

In the **absence of special education needs**, would this cost exist?

If the answer is...

- No, then the cost is an excess cost and may be eligible.
- Yes, then the cost is not an excess cost and is not allowed.

Is this cost **also generated by students without disabilities**?

If the answer is...

- No, then the cost is an excess cost and may be eligible.
- Yes, then the cost is not an excess cost and is not allowed.

If it is a child-specific service, **is the service documented in the student's IEP?**

If the answer is...

- Yes, then the cost is an excess cost and may be eligible.
- No, then the cost is not an excess cost and is not allowed.

Allowable Costs Under the IDEA Guide



Allowable Costs for IDEA Entitlement Grants

Expenditure Guidelines for IDEA Funds
(Revised January 2025)

Visit the ESS Program Management website to download the materials from the Allowable Costs Under the IDEA webinar.

- [PDF of PowerPoint presentation](#)
- [Zoom Recording link](#)
- [Allowable Costs Under the IDEA guide](#)
- [Educator ID template](#)

IDEA Part B Funds in Arizona

Section 611 – Subgrants to LEAs

Serves students ages 3–21

Section 611 of the IDEA (formerly called the IDEA Basic grant)

\$222,101,536 for FY24 full award

\$200 million for FY25 preliminary

642 public education agencies

Section 619 – Preschool subgrants to LEAs

Serves students ages 3–5, including Kindergarten

Section 619 of the IDEA (formerly called the IDEA Preschool grant)

\$4,509,480 for FY24 full award

\$4 million for FY25 preliminary

445 public education agencies

What Happens If I Waive My Funds?

The ESS Program Management team has recorded your public education agency's intent to waive funds for the IDEA Sections 611 and/or Section 619 grants within the IDEA Part B application for FY25. Once waived, this allocation of funds will be unavailable to you for the remainder of the project period. Please add a note to the history log of this funding application to confirm waiving these federal special education funds.

Under 34 C.F.R. §§ 300.705(c), 300.817 these funds may be redistributed and will no longer be associated with your public education agency.

The PEA may be ineligible for other IDEA funding opportunities (i.e., High-Cost Child claims)

Once the funds are waived, you cannot request them later.

IDEA funds have 100% carryover, so you may roll them over to the next fiscal year

- FY24 waived allocations
 - Section 611 (IDEA Basic), 18 PEAs, \$221,563.50
 - Section 619 (IDEA Preschool), 100 PEAs, \$82,648



How Does a SPED Director Plan a Budget?

- Work closely with your Business Manager
- Know your MOE Compliance spending amounts
- Evaluate your needs for staff, services, and supplies/equipment
- Determine which funding source may be used to pay for a given cost
- Consider additional funding sources
 - Desegregation funds
 - Impact Aid
 - Medicaid School-Based Claims
 - ESS Claims (High-Cost Child)

Budget Planning Tool

| 2023-2024 Budget | PEA Name | Expiration of funds | What PEA currently has budgeted (03/01/2023) |
|--|-----------------|---------------------|--|
| | Amount for FY24 | | |
| State M&O Budget | \$ 2,985,000.00 | 6/30/2024 | \$ 2,985,000.00 |
| Section 611 FY23 Carryover | | 9/30/2024 | |
| Section 619 FY23 Carryover | | 9/30/2024 | |
| Section 611 FY24 | \$ 1,043,402.10 | 9/30/2025 | |
| Section 619 FY24 | \$ 12,435.41 | 9/30/2025 | |
| Total Available to Spend | \$ 4,040,837.51 | | \$ 2,985,000.00 |
| Federal Dollars | \$ 1,055,837.51 | | \$ - |
| Section 611 (Basic) ages 3-21 | \$ 1,043,402.10 | | \$ - |
| Section 619 (Preschool) ages 3-5, including Kindergarten | \$ 12,435.41 | | \$ - |

State & Local funds that must be spent to maintain MOE Compliance
 Carryover must be spent by 9/30/24 or it will be forfeited to US Department of Education
 Carryover must be spent by 9/30/24 or it will be forfeited to US Department of Education
 normal IDEA activities, 100% of this grant can roll over to FY25
 normal IDEA activities, 100% of this grant can roll over to FY25

FY25 IDEA Part B Consolidated Important Dates

| Month | Activity |
|----------------|---|
| March 2024 | 1 – FY25 Preliminary allocations posted to ESS website. Self-Assessment and General Statement of Assurance due |
| May 2024 | 1 – Grants Management deadline for FY25 applications |
| July 2024 | 1 – FY25 project period begins 15 – FY25 Adopted budgets due to School Finance 18 – IDEA Maintenance of Effort (MOE) Eligibility opens; ESS program specialists approve IDEA Funding applications |
| August 2024 | 17 – IDEA MOE Eligibility closes |
| October 2024 | 1 – October Data Collection captured by PEAS and submitted to ESS Data Management |
| November 2024 | Fall Allocation Adjustment (full award) |
| February 2025 | Spring Allocation Adjustment (new/expanding charter requests) |
| September 2025 | 30 – Project Period Ends |
| December 2025 | 27 – Completion Reports must be approved by GM team |



Programmatic Review of Grants

ESS Program Management specialists review IDEA funding applications

- MOE Eligibility tested on July 18
- GSA and IDEA Statement of Assurances, due March 1 and June 12 respectively
- All funding application sections complete
- Proportionate Share and CCEIS obligations are fulfilled
- Budget narratives are allowable and coding follows USFR/USFRCS
- Capital Outlay Worksheets are required for specific codes
- Districts = 6731–6739
- Charters = 0190 for items greater than \$5,000 unit price

Substantial Approval

Substantial Approval Date: Once a Funding Application is approved by ADE, the applying organization is then able to obligate funds as of the date on which the funding application was submitted in a substantially approvable form.

Substantial Approval: Acceptable submitted status of a Funding Application to ADE for approval. ADE reserves the right to determine the qualifying characteristics of Substantial Approval.

ADE/ESS is unable to grant substantial approval dates until after the PEA has been tested for Maintenance of Effort (MOE) Eligibility.

If the PEA passes MOE Eligibility, the Substantial Approval Date reverts to the beginning of the project period if the grant was approvable prior to 7/1/2024.

If the PEA fails MOE Eligibility, the funding application will be returned and the PEA will be unable to resubmit until the MOE case is resolved.

- ✓ Approvable Budget
- ✓ GSA
- ✓ IDEA Statement of Assurances
- ✓ MOE Eligibility Test: Pass



What User Roles Should PEA Staff Have in the GME?

Review the [GME User Roles Fast Facts](#) in the GME Resource Library in the User Roles/User Access Administration section. The information on this slide comes directly from a GME resource. View your roles in the GME Address Book.

| | |
|-------------------------------|--|
| LEA Authorized Representative | Coury, Kirsten Garcia, Lori Harper, Holly Hawley, Lauri Leonard, Kathleen Little, Laurie Lopezlira, Christine Meredith, Judy Myers, Michelle Pischke, Debbie Vesely, Laura Virgil, Linda Walters, Marshall Williams, Nancy Woolsey, Hobbs, Maria Zwar, Breeanna |
| LEA Business Manager | Garcia, Regina Hawley, Lauri Meredith, Judy Myers, Michelle Rotenberger, Lori Virgil, Linda Little, Laurie |

| GME Role | Description |
|-------------------------------------|--|
| LEA Business Manager | <ul style="list-style-type: none"> • Initiates and edits FAs, RRs, CRs • First level of approval for FAs • Only role required for RRs & CRs • Initiates, edits, and submits the Indirect Cost Request |
| LEA Authorized Representative | <ul style="list-style-type: none"> • Second and final approval for funding applications (incl. revisions) • Cannot initiate or edit |
| LEA IDEA Part B Consolidated Update | <ul style="list-style-type: none"> • Edits specific FAs (including revisions), RRs & CRs • FA-specific (e.g. LEA CTE State Priority Update) • Accesses items tied to 1 FA • Cannot initiate or approve |

USFR for Public Education Agencies

USFR for Charter Schools

This is the Uniform System of Financial Records for Arizona Charter Schools (effective 07/01/2021). The USFRCS is the accounting and financial reporting manual for Arizona charter schools.

USFR for Districts

This is the Uniform System of Financial Records for Arizona School Districts (effective 07/01/2023). The USFR is the accounting and financial reporting manual for Arizona district schools.

The USFR is followed for all funding applications in Grants Management.

GME Training



Register for upcoming GME webinars:

February

Wednesday, 2/14/24 (10:30–11:00 a.m.)

Fiscal Frameworks: User Roles and User Access Administration Webinar

Wednesday, 2/28/24 (10:00–11:00 a.m.)

Getting Started: Overview of GME Navigation & Funding Applications Webinar

March

Tuesday, 3/5/24 (11:00–11:30 a.m.)

GME User Roles Lunch and Learn Webinar

Wednesday, 3/6/24 (12:00–1:00 p.m.)

Fiscal Frameworks: Reimbursement Requests

* [Register to attend via the Arizona Professional Learning and Development \(APLD\) System](#)



Funding Application Sections

The LEA Business Manager must change the status to Draft Started to begin editing the application.

Frequently used sections are highlighted to the right.

Application Status: Not Started

Change Status To: **Draft Started**

| | |
|--------------------------|--|
| <input type="checkbox"/> | History Log |
| <input type="checkbox"/> | Allocations |
| <input type="checkbox"/> | <u>Funding Disclaimer</u> |
| <input type="checkbox"/> | Organization Contacts |
| <input type="checkbox"/> | <u>Contacts</u> |
| <input type="checkbox"/> | Section 611 - Subgrants to LEAs |
| <input type="checkbox"/> | Section 619 - Preschool Subgrants to LEAs |
| <input type="checkbox"/> | <u>Substantially Approved Dates</u> |
| <input type="checkbox"/> | IDEA Part B Consolidated Checklist |

History Log

The history log is used to communicate between the PEA and ADE.

Program Management will record important information for the PEA specialized activities such as Proportionate Share and CCEIS.

Program Management also uses the history log to request edits to the funding application.

History Log

IDEA Part B C

Save And Go To ▶

[View All Status/Comments](#)

| Attention Needed | Date | User | Status (S)/Comment (C) |
|--------------------------|---------------------|-----------------|--|
| <input type="checkbox"/> | 1/9/2024 9:22:24 AM | Candice Trainor | <p>2nd notification of intent to forfeit funds:</p> <p>The public education agency has not applied for the FY24 IDEA grants. ADE/ESS will forfeit these funds at the end of the project with this application.</p> <p>The FY24 IDEA Part B project period began on 7/1/23. Your PEA has not submitted the funding application to LEA Authorized Representative. Please charge costs to the grant from 7/1/23 until your funding application is submitted to LEA Authorized Representative Approved.</p> <p>ESS Program Management will not be able to grant substantial approval of the funding application until the LEA has:</p> <ul style="list-style-type: none">•General Statement of Assurances accepted by ADE Grants Management•IDEA Statement of Assurances completed in ESS Portal•Complete budget and funding application submitted to LEA Authorized Representative Approved•Met requirements for IDEA Maintenance of Effort Eligibility test <p>Contact essprogrgmt@azed.gov for assistance. CC: LEA Association</p> |

Allocations

Allocations

IDEA Part B Consolidated - Rev 1 - Allocations

Go To ▶

| | (1) <u>IDEASECBASIC</u> CFDA: 84.027A | (2) <u>IDEASECPRES</u> CFDA: 84.173A | Total |
|-----------------------------|---|--|-----------------------|
| Original | \$1,035,651.52 | \$26,242.69 | \$1,061,894.21 |
| Incoming Carryover | \$460,288.38 | \$28,752.71 | \$489,041.09 |
| Outgoing Carryover | \$0.00 | \$0.00 | \$0.00 |
| Reallocated | \$0.00 | \$0.00 | \$0.00 |
| Additional | \$0.00 | \$0.00 | \$0.00 |
| Incoming Interest Carryover | \$0.00 | \$0.00 | \$0.00 |
| Released | \$0.00 | \$0.00 | \$0.00 |
| Consortium | \$0.00 | \$0.00 | \$0.00 |
| Forfeited | \$0.00 | (\$1,799.89) | (\$1,799.89) |
| CR Released | \$0.00 | \$0.00 | \$0.00 |
| Total | \$1,495,939.90 | \$53,195.51 | \$1,549,135.41 |

Organization Contacts

Organization Contacts

Arizona Department of Education (00011000) Test District - FY 2024 - Global Hold(s): (2021, 2022, 2023) - IDEA Part B Consolidated - Rev 0 - Organization Contacts

Go To

Organization Contacts

This required section is to enable the Arizona Department of Education to more effectively provide relevant and targeted information and support to educational organizations and reduce communications not relevant to other general users within the GME system.

Organization Direct-Hire Staff

• Primary Point of Contact for this Funding Application/Grant is required for all funding applications

• If Federal Programs contact is not applicable, enter "N/A" for all cells in this row. Enter alternate program contact(s) in row "Other", clicking "Add Row" to add multiple contacts as applicable

• "Other" may be used for any other relevant program or organizational contacts

• **NOTE:** For vendors/contractors/consultants serving in any of the designated positions in the first table below, enter contact information in the table designated as Vendors/Contractors/Consultants*

| CONTACT TYPE | NAME | EMAIL | PHONE |
|---|----------------------|----------------------|----------------------|
| Primary Point of Contact for this Funding Application/Grant: | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Organization Business/Finance Manager or CFO: | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Superintendent/Charter Holder: | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Federal Programs Director or Programs Primary Point of Contact: | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Other (enter title) | <input type="text"/> | <input type="text"/> | <input type="text"/> |

PEAs must provide name, email address, and phone number of key staff involved with the funding application.

- Primary Point of Contact for this Funding Application/Grant
- Organization Business/Finance Manager or CFO
- Superintendent/Charter Holder
- Federal Programs Director or Programs Primary Point of Contact
- Other (Special Education Director), if the SPED Director was not included in the above roles

ESS uses these contacts to send information about MOE Compliance and other federal funding issues.

Vendors/Contractors/Consultants

Vendors/Contractors/Consultants:

- Please enter all vendors/contractors/consultants (hereafter referred to as "vendor") who serve in any of the roles in the table above. Please also enter all vendors who have been provided roles in the GME system to directly work with Funding Applications, Reimbursement Requests, Completion Reports, Fiscal Monitoring, Single Audit, Indirect Cost and any reporting supplements.
- In the table below enter the organizational role, capacity served and/or operational function held by each vendor as it relates to grant funding
- Click "Add row" for each vendor/contractor/consultant

NOTE: Per the State Superintendent of Public Instruction's policy statement distributed on February 26, 2021, ADE's expectations are that the LEA takes full responsibility for the grant application, use of funds and accountability tied to both. Vendor roles and permissions in GME are permitted as follows:

- Vendor may not be provided with the LEA Entity Authorized Signer and as such, may not sign the General Statements of Assurances (GSAs) or other legally binding documents to ADE on behalf of the LEA.
- Vendor may not be provided with the LEA Authorized Representative role in GME.
- Vendor may be permitted to hold the LEA User Access Administrator role in GME only in addition to a minimum of two LEA staff holding the same role. Vendor holding this role may not provide themselves with any prohibited roles.
- Vendor may be permitted to hold Fiscal Monitoring Update and/or Single Audit Update role(s) in GME only in addition to a minimum of two LEA staff holding the same role.

| ORGANIZATIONAL ROLE, CAPACITY OR FUNCTION(S) SERVED | NAME | EMAIL | PHONE |
|---|------------|---------------------------|--------------|
| (EXAMPLE) Business Manager, contracted | John Smith | jsmith@abccconsulting.com | 602-555-2368 |
| | | | |

ADE has provided [guidance regarding the use of vendors/consultants](#) when applying for grant funds. This guidance is also included within assurances in the GSA section "Grants Management Enterprise (GME) System User Assurances." LEAs may use third-party vendors but must remain the responsible sub-grantee and be involved in the application process.

If your PEA contracts with a third-party vendor for SPED Director or Business Manager roles, please identify that in the Vendors/Contractors/Consultants list in the Organization Contacts Section.



Grant Sections

- [-] Section 611 - Subgrants to LEAs
 - [FFATA & GSA Verification](#)
 - [General Education Provisions Act \(GEPA\)](#)
 - [Budget](#)
 - [Budget Overview](#)
 - [Budget Overview Plus/Minus](#)
 - [Program Information / Instruction](#)
 - [Program Narrative Questions](#)
 - [Assurances](#)
 - [Capital Outlay Worksheet](#)
 - [Related Documents](#)
- [-] Section 619 - Preschool Subgrants to LEAs
 - [FFATA & GSA Verification](#)
 - [General Education Provisions Act \(GEPA\)](#)
 - [Budget](#)
 - [Budget Overview](#)
 - [Budget Overview Plus/Minus](#)
 - [Program Information / Instruction](#)
 - [Program Narrative Questions](#)
 - [Capital Outlay Worksheet](#)
 - [Related Documents](#)
- [-] Substantially Approved Dates
 - [Substantially Approved Dates](#)
- [-] IDEA Part B Consolidated Checklist
 - [IDEA Part B Consolidated Checklist](#)

All

For each grant, PEAs must complete the Budget, GEPA, FFATA & GSA Verification, and Program Narratives sections.

Section 611 Assurances must also be completed.

Review the Program Information and Instructions section for each grant.

FFATA & GSA Verification

1. The district/organization has submitted OR will be submitting the annual General Statement of Assurance

* Yes

2. The district/organization understands that if ADE is not updated with the organization's SAM.gov information, including SAM.gov registration expiration, that funding for the organization can be placed on hold.

* Yes

* 3. Please provide a short description of your project in one to two paragraphs:

General Provisions Act (GEPA)

1. Describe how your entity's existing mission, policies, or commitments ensure equitable access to, and equitable participation in, the proposed project or activity.

2. Based on your proposed project or activity, what barriers may impede equitable access and participation of students, educators, or other beneficiaries?

3. Based on the barriers identified, what steps will you take to address such barriers to equitable access and participation in the proposed project or activity?

New GEPA Requirement in FY24 Applications as of July 1, 2023 (7/3/2023)



GEPA

As of July 1, 2023 all federal grant funding applications in the GME system will include a section to which will satisfy the requirements of Section 427 of the General Provisions Act (GEPA) ([20 U.S.C. 1228a](#)).

Section 427 requires each applicant for funds to include in its application a **description of the steps the applicant proposes to take to remove barriers and to ensure equitable access to, and participation in, its Federally-assisted program for students, teachers, and other program beneficiaries.**

What you need to know for FY24:

- The GEPA page will **only** be visible once the application is in Revision status
- The page will be found in the section titled **General Education Provisions Act (GEPA)**.
 - o Will **not** impact original applications
 - o **Required with first revision**
 - o A validation error will prevent application status from being changed to CR Draft started if the GEPA page is not completed.
 - There is **not** a minimum word count for a GEPA statement

What you need to know for FY25:

- The GEPA page will be part of the **Original** application and will be **required on initial funding application submission**

For assistance within the GME system, please contact Grants Management at 602.542.3901, or submit a service request online at <https://helpdeskexternal.azed.gov/>

4. What is your timeline, including targeted milestones, for addressing these identified barriers?

PEAs must respond to the GEPA form on the first revision of IDEA Part B.

Program Narrative Questions

* 1. Please give an overview of your application, the priorities of special education your application addresses, details of any capital requests, and how these federal funds will enhance your special education program.

Reminder: Section 619 - Preschool Subgrants to LEAs funds may be used for students with disabilities ages 3–5 years old in a public education agency.

Program Questions

* 1. Please give an overview of your application, the priorities of special education your application addresses, details of any capital requests, and how these federal funds will enhance your special education program.

Reminder: Section 619 - Preschool Subgrants to LEAs funds may be used for students with disabilities ages 3-5 years old in a public education agency.



Types of Budget Requests in IDEA Grants

Typical IDEA Activities

- Personnel and Contracted Vendors
- Supplies and Equipment
- Professional Development
- Other Costs

Specialized IDEA Activities

- Coordinated Early Intervening Services: IDEA funds may be used to pay for intervention strategies for non-disabled students, not to exceed 15% of FY25 allocation.
- Proportionate Share: IDEA funds are used to serve students with disabilities who have been parentally-placed in a non-profit private school or homeschool.

Budget Narratives

- Specificity is important, but do not share PII
- Remember requirements of coding according to USFR/USFRCS
- Educator IDs must be updated before you submit a reimbursement request in that function/object code
- The budget narrative should stand alone; all information relevant to the request should appear in the budget narrative, not just the Capital Outlay Worksheet

Budget Narratives (continued)

- Revise budget narratives as your scope of work changes
- Explicit definition of the audience for supplies, materials, and programs in general classrooms for students with disabilities (e.g., Special Education Students in a preschool classroom)
- Training and travel costs for either special education staff members **or** general staff for when it is professional development in special education

Special Education Teachers Budget Example

- 3 Certified Special Education teachers and 1 FTE Instructional Aide working under the direct supervision of a certified special education teacher

PEAs may opt to include a [spreadsheet](#) in the Related Documents section to show instructional aide/supervisor relationships

- 1 early childhood special education certified teacher (1234567) and 1 special education certified teacher (2345678)
- 1 special education teacher that holds a special education certificate (TBD)
- 1 instructional aide working under the direct supervision of a special education certified teacher (2345678)

Supplies Example

Example:

- 6600/2100: “Funds used to pay for paper, binders, dividers, highlighters, folders, etc. used in the Special Education and Speech rooms”

2025 Budget Narrative:

- 6600/2100: “Funds used to pay for supplies used in the Special Education and Speech rooms to develop supplemental materials to align with students’ IEP goals and send progress reports to families on IEP goals.”

Software/APPs Example

Example :

- 6600/1000: “Student supplies to include computer program subscriptions.”
- 6737/2100: “Annual subscription to IEP management software”

2025 Budget Narrative:

- 6600/1000: “Apps or software license subscriptions determine as Assistive Technology Considerations for students with disabilities (such as Co-write, Dragon Naturally Speaking, etc.) to align with their IEP goals”
- 6600/2100: Annual subscription to IEP management software



Proportionate Share

Dear IDEA Administrator,

Please review your district's obligation for proportionate share for the current fiscal year (FY24).

| PEA Name (00000000) | Section 611-Subgrants to LEAs | Section 619-Preschool Subgrants to LEAs |
|---------------------------------------|-------------------------------|---|
| FY2024 Proportionate Share Obligation | \$ 96,347.07 | \$ 5,192.27 |

Please ensure all proportionate share budget narratives identify the use of funds to provide services to parentally placed private school special education students.

Example Budget Narrative:

"Proportionate Share: These funds will be used to pay for related services for parentally placed private school special education students."

Any unspent FY2024 proportionate share funds must be carried over to the FY2025 IDEA Part B Consolidated grants through the Completion Report at the end of the project period, 9/30/2024.

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

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

Proportionate Share Example

Example :

- 6300/2100: “Proportionate Share: equitable services for private school students: speech and academic supports”

2025 Budget Narrative:

- 6300/2100: “Proportionate share: Contracted related services such as speech and OT for SPED eligible private school students on ISPs”
- 6300/1000: “Proportionate share: contracted special education certified teacher (9012345) to provide specially designed instruction to eligible private school students on ISPs”

Proportionate Share Amounts and Carryover

Proportionate Share Obligations will be posted on the 2025 Preliminary Allocations workbook by March 2024 on the ESS Program Management web page.

Proportionate Share Obligations must be expended by the end of September 2025; if not, a one-year carryover of funds must be used.

If funds are not fully expended by September 2026, the remaining funds must be returned to the U.S. Department of Education.

34 CFR § 300.133 (a) (3)

If an LEA has not expended for equitable services all of the funds described in paragraphs (a)(1) and (a)(2) of this section by the end of the fiscal year for which Congress appropriated the funds, the LEA must obligate the remaining funds for special education and related services (including direct services) to parentally-placed private school children with disabilities during a carry-over period of one additional year.

34 CFR § 300.133 (d)

Supplement, not supplant. State and local funds may supplement, and in no case supplant, the proportionate amount of federal funds required to be expended for parentally-placed private school children with disabilities under this part.

Coordinated Early Intervening Services

PEAs flagged to be significantly disproportionate will be required to spend 15% of the FY25 IDEA allocation on Comprehensive Coordinated Early Intervening Services (CCEIS).

PEAs who voluntarily participate in Coordinated Early Intervening Services (CEIS) may spend up to 15% of the FY25 IDEA allocation on these activities.

- [ADE CEIS](#)
- [May 2019 Reporting Memo](#)
- [Technical Assistance Manual on Coordinated Early Intervening Services](#)
- [Comparison of CEIS and CCEIS](#)

CCEIS History Log

Dear IDEA Administrator,
The district's FY24 obligation for Comprehensive Coordinated Early Intervening Services (CCEIS) expenditures is \$10,995.10. This amount may be split between the Section 611 and Section 619 grants in accordance with the district's plan for Comprehensive Coordinated Early Intervening Services.

Please use CCEIS in your budget narratives to identify activities toward this obligation. ESS Program Management specialists will ensure the total amount has been budgeted. For questions about significant disproportionality or significant discrepancy, please contact essoperations@azed.gov.

2024 IDEA Preliminary

Updated on: 2/7/23

Contact essprogmgmt@azed.gov for questions.

| Entity ID | CTDS | PEA Name | Section 611 Allocation | Section 611 Proportionate Share Obligation (How much has to be spent on Parentally-Placed Private School Students, K-12th grade ages 3-21) | Section 619 Allocation | Section 619 Proportionate Share Obligation (How much has to be spent on Parentally-Placed Private School Students, Kindergarten ages 3-5) | Maximum Amount that can be used for CEIS |
|-----------|------|----------|------------------------|--|------------------------|---|--|
| | | | \$ 71,843.04 | \$ - | \$ 1,457.61 | \$ - | \$ 10,995.10 |

Thank you.

CC: LEA Business Manager, LEA Authorized Representative

CEIS Example

Example :

- 6100/1000: Salary for reading intervention specialist

2025 Budget Narrative:

- 6100/1000: “CEIS: Salary for 1 reading intervention specialist to work with general education students in 1st–3rd grades through the district-wide MTSS framework”



IDEA Part B Checklist

PEAs can review progress toward SEA Program Specialist Approval on the IDEA Checklist.

Questions 1–4 refer to GME issues.

Questions 5–8 refer to IDEA funding application requirements.

All checklist items begin in the Not Reviewed status and will be marked OK once the requirement is satisfied.

If a checklist item is marked “Attention Needed” the program specialist will leave a history comment giving the PEA instructions on how to resolve the issue(s).

| Checklist Description <small>(Collapse All Expand All)</small> | | |
|---|------------------|----------------------|
| <input type="checkbox"/> 1. General Statement of Assurance (GSA) has been submitted | OK | 6/14/2023 4:26:00 PM |
| <input type="checkbox"/> 2. FFATA & GSA Verification page has been completed | OK | 6/14/2023 4:26:00 PM |
| <input type="checkbox"/> 3. Reviewed LEA for outstanding Issues | OK | 6/14/2023 4:26:00 PM |
| <input type="checkbox"/> 4. Reviewed for High Risk Status | OK | 6/14/2023 4:26:00 PM |
| <input type="checkbox"/> 5. Capital Outlay Worksheet page has been reviewed (IDEA - Basic) | Not Applicable | 6/14/2023 4:26:00 PM |
| <input type="checkbox"/> 6. Maintenance of Effort | Not Reviewed | 6/14/2023 4:26:00 PM |
| <input type="checkbox"/> 7. IDEA Statement of Assurances | OK | 6/14/2023 4:26:00 PM |
| <input type="checkbox"/> 8. Programmatic review completed | Attention Needed | 6/14/2023 4:26:00 PM |
| 1. ESS Program Specialist has completed the review of all sections of the funding application; edits are required. (Identify any sections of the funding application that require PEA edits in the text below.) | | |
| Waiting on MOE | | |

Flowchart for Programmatic Review and Substantial Approval Date

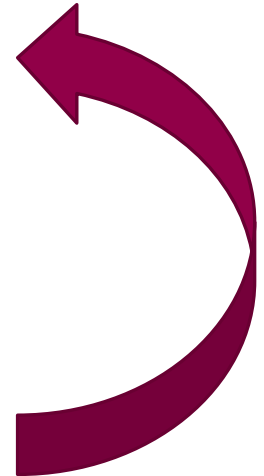
- PEA submits funding application
- Programmatic review completed by ESS Specialists; funding applications are returned for edits as needed
- MOE Eligibility testing window begins on 7/18/2024

*Pass MOE

*Fail MOE

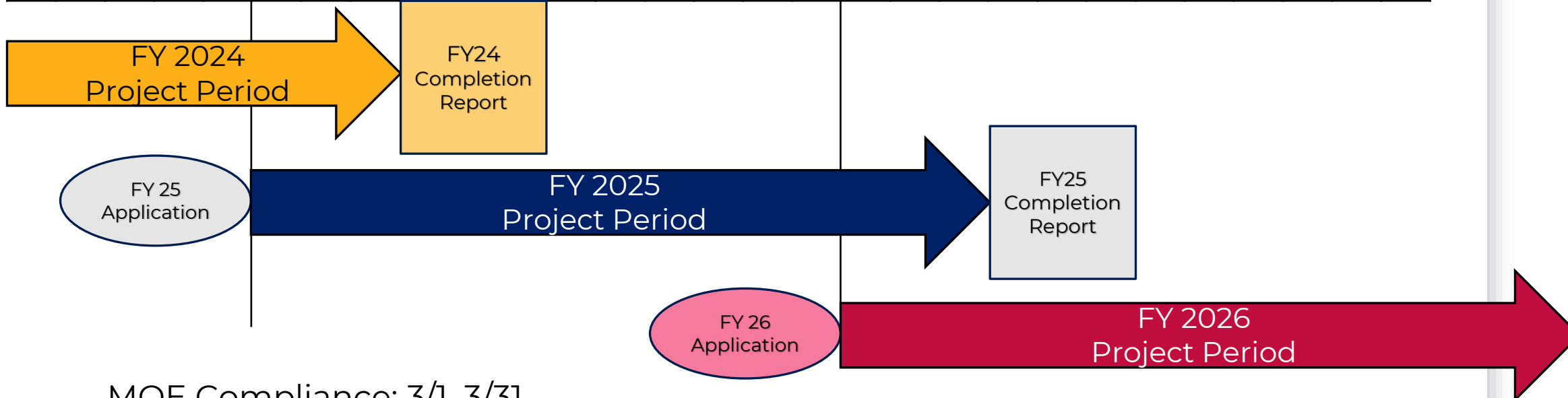
*Return funding application until MOE case is resolved

- Program Specialist Approved, substantial approval date established from last LEA Authorized Representative Date
 - SEA Director Approved
- PEA may obligate funds, submit reimbursement requests, and revise funding application as needed



Timeline of IDEA Grants

| 2024 | | | | | | | | | | | 2025 | | | | | | | | | | | 2026 | | | | | | |
|------|---|---|---|---|---|---|---|---|---|---|------|---|---|---|---|---|---|---|---|---|---|------|---|---|---|---|---|---|
| F | M | A | M | J | J | A | S | O | N | D | J | F | M | A | M | J | J | A | S | O | N | D | J | F | M | A | M | J |
| e | a | p | a | u | u | u | e | c | o | e | a | e | a | p | a | u | u | u | e | c | o | e | a | e | a | p | a | u |
| b | r | r | y | n | l | g | p | t | v | c | n | b | r | r | y | n | l | g | p | t | v | c | n | b | r | r | y | n |



MOE Compliance: 3/1–3/31
 MOE Eligibility: 7/18–8/15



Planning for Reimbursement Requests

| Percentage of Allocation Paid Out | Q1 7/1/24– 9/30/24 | Q2 10/1/24– 12/31/24 | Q3 1/1/25– 3/31/25 | Q4 4/1/25– 6/30/25 | Q5 7/1/25– 9/30/25 |
|--|-----------------------------------|-------------------------------------|-----------------------------------|-----------------------------------|-----------------------------------|
| 12-month fiscal period | 25% | 50% | 75% | 100% | n/a |
| 15-month fiscal period | 20% | 40% | 60% | 80% | 100% |

IDEA grant funds operate on a 15-month project period, with 12-month carryover, for a total of 27 months for obligation. IDEA grant funds must be liquidated (through CR process) 120 days after the expiration of the funds.

If you anticipate having carryover of your 2024 IDEA grants, you must ensure that the carryover amount is fully drawn down by 9/30/2025 to prevent any funds from expiring and being returned to U.S. Department of Education.

Current Percentages Paid on 2024 IDEA Part B

| Allocation | Amount Paid | Percentage paid as of 2/5/24 |
|-------------------------------|--------------|------------------------------|
| IDEA 611 | \$51,833,840 | 26.7% |
| IDEA 619 | \$975,092 | 23.7% |
| 2023 IDEA Basic Carryover | \$23,405,524 | 45.1% |
| 2023 IDEA Preschool Carryover | \$513,174 | 29.5% |
| Year to date goal | | 50–60% |

Avoiding Expiring Funds for FY24 IDEA

- Once a Completion Report is approved by ADE Grants Management, unspent FY23 funds become available in the current year's funding application as incoming carryover.

| Grant Name | Amount Unpaid | Percentage Unpaid |
|---------------------|----------------------|--------------------------|
| 2023 IDEA Basic | \$28,513,698 | 54.9% |
| 2023 IDEA Preschool | \$1,226,956 | 70.5% |

Funding Source Data in Project Summary

| Funding Sources | | | | |
|-----------------------------|-------------------------|-------------------------|-------------------------|----------------|
| Grant - Award Year | IDEASECBASIC - 2024 | IDEA Basic - 2023 | IDEA Basic - 2022 | Total |
| Award Number | H027A210007 | H027A220007 | H027A210007 | |
| Award Date | 07/01/2023 - 09/29/2025 | 07/01/2022 - 09/30/2024 | 07/01/2021 - 09/30/2023 | |
| Original | \$1,323,344.10 | \$0.00 | \$0.00 | \$1,323,344.10 |
| Incoming Carryover | \$0.00 | \$96,166.96 | \$0.00 | \$96,166.96 |
| Outgoing Carryover | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Reallocated | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Additional | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Incoming Interest Carryover | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Released | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Consortium | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Forfeited | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| CR Released | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Total Allocation | \$1,323,344.10 | \$96,166.96 | \$0.00 | \$1,419,511.06 |

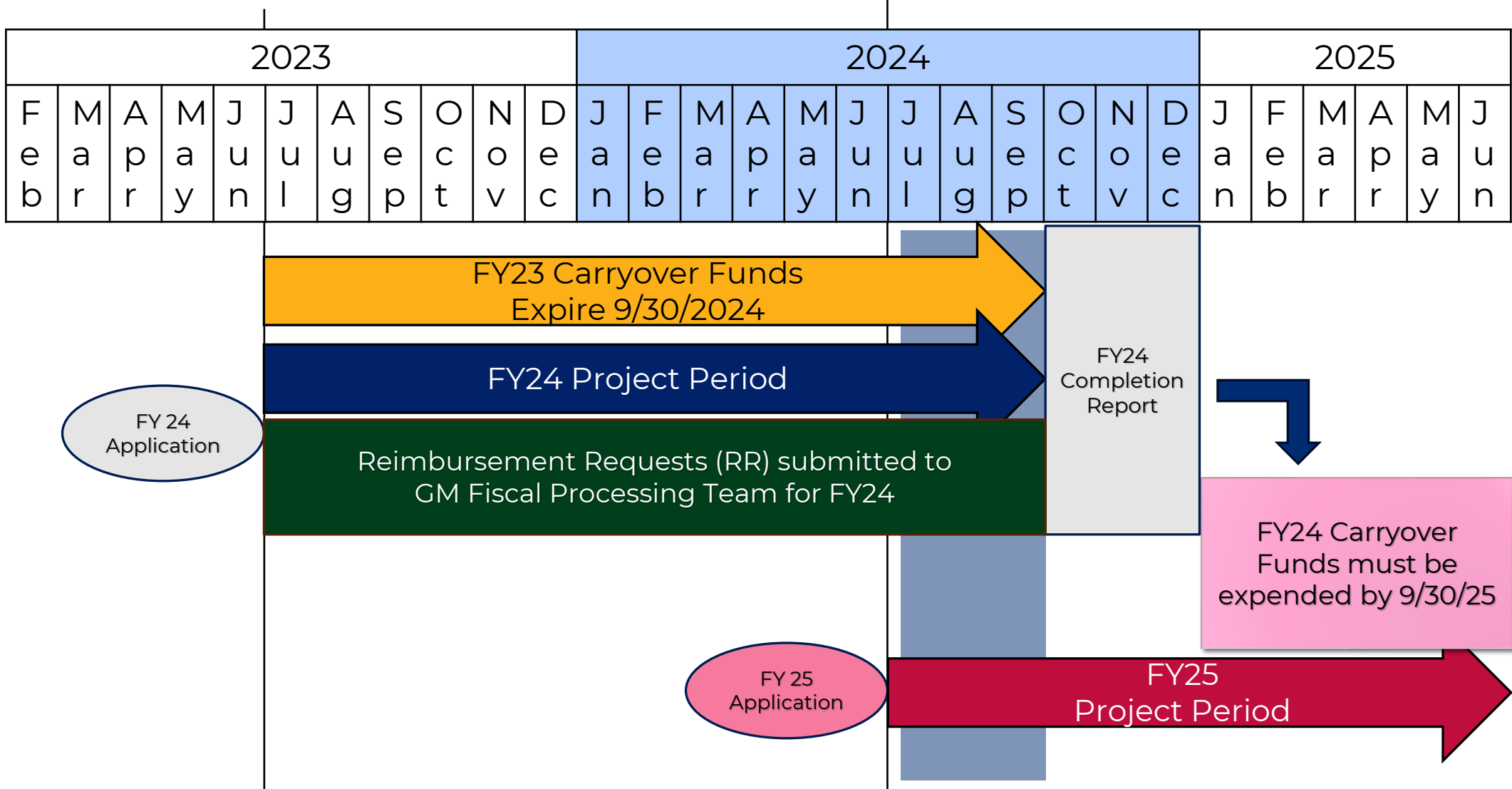
Reimbursement Requests



2024 ▾ IDEA Part B Consolidated ▾

| Grant | Available Budget | Total Available Amount | Received Amount | Net Available Amount |
|---|------------------|------------------------|-----------------|----------------------|
| Section 611 - Subgrants to LEAs | \$1,419,511.06 | \$1,419,511.06 | \$401,526.57 | \$1,017,984.49 |
| Section 619 - Preschool Subgrants to LEAs | \$17,953.99 | \$17,953.99 | \$10,375.95 | \$7,578.04 |

Spending Patterns of IDEA Grants



FY24 ESS Program Management Webinar Series

FY24 Webinar Series

Join the ESS Program Management team at the FY24 webinar series. Webinars will take place via Zoom from 11:00 a.m. to 12:00 p.m. on the 2nd Tuesday of each month (unless indicated otherwise).

- [March 1, 2024](#): IDEA Maintenance of Effort (Friday)
- [April 9, 2024](#): Special Education Funding: How, When, and What Order to Spend?
- [May 7, 2024](#): Fiscal Year Wrap-Up

ESS Office Hours

ESS Program Management will also host Office Hours each quarter at 1:00 p.m. PEAs are invited to attend these informal Zoom meetings to bring questions directly to their program specialist.

- [February 20, 2024](#)
- [March 19, 2024](#)
- [April 16, 2024](#)
- [May 21, 2024](#)

Contact Us

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Director of Finance:
[Candice Trainor](#), 602-542-3398

| PEA Name Starts With | Program Specialist | Phone Number |
|----------------------|---------------------------------|--------------|
| A-C | Nancy Chavarin | 602-542-3270 |
| D-K | Tanya Rodriguez | 602-542-4610 |
| L-Q | Tanya Rodriguez | 602-542-4610 |
| R-Z | Nancy Chavarin | 602-542-3270 |