



# Service Plan Overview

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**FY-2016 FORMS ARE AVAILABLE**

For Forms, Instructions and Worksheets go to:

<http://education.vermont.gov/special-ed-finance-and-medicaid>



## Section A—Part 1

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- Summary of budgets for SU and member districts
- Cannot be completed until Section B and C are completed—must match sections B and C
- Includes budget breakout for K-12 and Preschool



## Section A – Part 2

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- Salary Survey
- List of teachers and their current year salary (salary only, no benefits)
- This information is used to determine the average salary, which is used to calculate the Mainstream Block Grant



## Section B – Part 1

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- Report of student/staff information
- Includes student and staff counts by category
- Used for trending purposes



## Section B – Part 2

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- Budget breakdown by category
- Used to determine advanced payments
- Used by AOE to determine necessary appropriation
- Used to determine estimated SEER rate



## Section B – Part 3

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- Extraordinary Cost Detail
- Used to determine the number of students and cost eligible for extraordinary reimbursement (over \$50,000)
- The amount of extraordinary reimbursement impacts the SEER rate



## Section B – Part 3(b)

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- Breakdown of Extraordinary Costs for multi-district supervisory unions or joint contract districts
- Used to determine advance payments



# Section C – Part 1

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- Preschool budget and children served
- Used for trending purposes





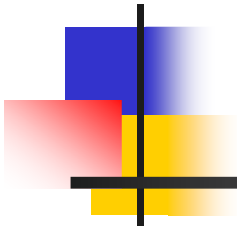
## Section D

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- Personnel Survey
- Parts 1, 2 and 3 include information on staff employed and vacant positions
- Information needed to meet federal reporting requirements

# How the Service Plan Impacts Funding

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# Mainstream Block Grant (3201)

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- Special Education Staffing
  - 9.75 Special Education Teachers per 1000 ADM x state-wide average salary for special education
- Special Education Administration
  - 1 to 2 Administrators per Supervisory Union x state-wide average salary for Special Education Director
- 60% state grant; 40% local match



# Mainstream Block Grant Example

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- Special Education Staffing
  - $250 * 9.75 = 2,437.5 / 1000 = 2.4375$
  - $2.4375 * 56,702 = \$138,211$
- Special Education Administration
  - Every SU gets at least 1 position; the largest SU in the state gets 2 positions. The number of admin positions is distributed to the member districts based on ADM
  - $.18 \text{ Admin position} * 87,117 = \$15,681$
- Total Block Grant \$153,892
  - 60% state share = \$92,335
  - 40% local share = \$61,557

# Estimated SEER Payments (3202)



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- The Service Plans are used to determine the special education expenditure reimbursement rate—56.5% for FY15
- The Service Plan amount minus IDEA-B funding minus the Mainstream Block Grant multiplied by the expenditure rate equals the Service Plan Amount
- Remember—AOE funds districts; the Service Plan amount includes the districts costs from Section B Part 2 of the Service Plan and the costs distributed to the district on the Section B Part 2 for the SU



# Service Plan Amount Example

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District cost on Part B page 2	\$610,000
District cost on SU Part B page 2	<u>+ \$110,000</u>
Total Service Plan Estimate	<b>\$720,000</b>
Minus IDEA-B Funding	- \$ 63,924
Minus Block Grant Funding	<u>- \$100,520</u>
Service Plan Eligible Funding	<b>\$555,556</b>
Multiplied by SEER Rate	<u>x 56.5%</u>
Service Plan Estimate	<b>\$313,889</b>



# December 15<sup>th</sup> Payment Example

- Statutory payment of 35% of service plan estimate and November 15<sup>th</sup> SEER
- Calculation:

■ 11/15 SEER Amount	\$103,006
■ multiplied by SEER Rate	<u>x 56.5%</u>
	<b>\$58,198</b>
■ minus SEER Advanced	<u>- \$47,083</u>
	<b>\$11,115</b>
■ plus 35% of Service Plan Estimate	<u>+ \$95,913</u>
	<b>\$109,861</b>
■ maxed at 55% of service plan estimate	\$172,639
■ minus advanced	<u>- \$47,083</u>
	<b>\$125,556</b>



# Special Education Funding Formula Payment Schedule

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<u>Payment Date</u>	<u>Block 3201</u>	<u>SEER 3202</u>	<u>Extraordinary 3203</u>
August 15	50%	15% of Service Plan Estimate	N/A
December 15	50%	35% based on Service Plan and Nov 15 <sup>th</sup> report	Reimbursement for Nov 15 <sup>th</sup> report
April 15	N/A	40% based on Service Plan and Mar 15 <sup>th</sup> report	Reimbursement for Mar 15 <sup>th</sup> report
Late June	N/A	N/A	Reimbursement for estimated final report
Mid September	N/A	Balance based on final report	Reimbursement for final report