

synergy 2023



A collaborative event for
school special education
and finance professionals.

November 2-3 | Georgetown

Agenda | Day One

8:45 – 9:00

Introductions and Welcome

TASBO & TCASE Staff

9:00 – 10:00

Bridging the Gap in Special Education Funding

This presentation is intended to foster relationships and discussions between the district business office and the Special Education Department. Attendees will be presented with various considerations and reflection opportunities for building a school special education budget, including allowability, the impact of school policies and building on the strengths of both departments.

Alexis Rae Gutierrez, EdD

*Consultant, Federal Funding
Region 20 ESC*

Natalie Hudson, EdD

*Executive Director of
Special Services &
Diverse Learners
The Varnett Public School*

10:10 – 11:10

Not All Audits are the Same: Compare and Contrast State and Federal Audit Requirements

This presentation aims to clarify the contrasting facets of compliance audits completed by your external auditors versus the Texas Education Agency (TEA) when it comes to federal funding. We will dive into the nuanced requirements, expectations, and key considerations for these audits, equipping you with insights straight from the auditor.

Jennifer Ripka

*Partner, Assurance
Services
Weaver*

11:20 – 12:20

State Allotment Monitoring Program – TEA Update & TASBO/LEA Perspective

The Special Education Program Allotment is one of the state programs that has a minimum spending requirement. This session will address the TEA flowchart to determine an LEA's compliance, consequences of noncompliance and FAQs related to allowable use of funds. TASBO and LEA monitoring tools will be shared to promote LEA ongoing review of special education expenditures to promote compliance.

Peggy Watts, CTSBS

*Manager
TEA*

Becky Estrada, RTSBA

*Chief Certification
Officer
TASBO*

BREAK

Lunchtime

1:20 – 1:50

Strategies to Create Your Budget & Monitor Allowable Expenditures

Building and monitoring the Special Education state allotment program budget is not a one-time event! The students identified and served, their instructional setting, days of attendance, and so many other factors determine the actual funding received and the allowable expenditures to meet their identified needs. Collaboration between finance and special education program staff is essential to monitor the budget on at least a six- week period throughout the school year.

Becky Estrada, RTSBA

*Chief Certification
Officer
TASBO*

2:00 – 3:00

School Health and Related Services (SHARS) Policy Clarifications

There have been adjustments and clarifications to the School Health and Related Service (SHARS) program. As a state agency responsible for training and compliance reviews, the Texas Education Agency (TEA) will provide guidance for the implementation of these revisions. At the end of the presentation, you will be able to assess your procedures to ensure compliance and a successful government audit.

Angela Foote
State and Federal Government
Program Specialist
TEA

Araceli Wright
Regional Support for Territory
6
Texas Medicaid and
Healthcare Partnership

3:10 – 4:40

MOE: Taking Control

Many districts feel helpless to manage their special education Maintenance of Effort threshold. This session will teach you the variables that you have control over and how you can manage the threshold. The MOE cycle, exceptions, SHARS, 55% program spending, CEIS/CCEIS can all seem overwhelming, but you will be shown a methodical, logical approach to MOE and strategies to use so that you not only maintain compliance, but also manage the threshold.

Cindy Moses
Consultant
TCASE

Agenda | Day Two

8:55 – 9:00

Welcome

9:00 – 10:30

Financial Impacts to Special Education Following 88th Texas Legislative Session(s)

Join Amanda Brownson and Andrea Chevalier for a discussion of how legislation passed during the 88th Texas Legislative Session (and potential special session in October) impacts finance and budgetary considerations for special education. Topics covered will include legislative appropriations for public education, changes to dyslexia programming and instructional arrangements, and a glimpse of what school funding topics are still on the table in the Texas Capitol.

**Amanda Bright
Brownson, Ph.D**
Associate Director of
Policy and Research
TASBO

Andrea Chevalier
Director of Governmental
Relations
TCASE

BREAK

Hotel Check Out

10:40 – 12:10

Staff Shortages: When to Hire, When to Contract, How to Procure and Other Staffing Strategies

Description to come.

Shellie Crow
Attorney
Walsh, Gallegos, Trevino,
Kyle & Robinson, P.C.