IMPACT AID GRANTS

How to Conduct an Impact Aid Survey
TODAY’S AGENDA

- Process Overview
- Considerations
- How do I survey?
- What do I do with the results?
PROCESS OVERVIEW
If your school district is new, START HERE
TO CONSIDER FOR YOUR LEA:

Children that qualify for grant eligibility and
Payment formula weights for categories
DOES MY LEA HAVE ENOUGH CHILDREN TO QUALIFY?

Basic Eligibility

3% or 400 children in ADA in these categories:
1. Parent lives and works on federal property
2. Parent is in the uniformed services
3. Child lives on Indian lands
4. Child lives in low rent housing

OR

F & G Eligibility

10% or 1,000 children in ADA in these categories:
1. Parent lives on federal property (not low rent housing)
2. Parent works on federal property
# CATEGORY WEIGHTS IN PAYMENT FORMULA

<table>
<thead>
<tr>
<th>Student</th>
<th>Parent</th>
<th>Category</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resides on Federal property</td>
<td>Civilian who works on federal property in the LEA</td>
<td>A(i)</td>
<td>1.0</td>
</tr>
<tr>
<td></td>
<td>Foreign military officer &amp; accredited foreign gov’t official</td>
<td>A(ii)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Is in U.S. Uniformed Service</td>
<td>B</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>C</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>D(i)</td>
<td>0.2</td>
</tr>
<tr>
<td></td>
<td></td>
<td>D(ii)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>E</td>
<td>0.1</td>
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<td></td>
<td></td>
<td>F</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>G(i)</td>
<td>0.05</td>
</tr>
<tr>
<td></td>
<td>Works on Federal property in same county as LEA</td>
<td>G(ii)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Works on Federal property in same state as LEA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resides on Indian Lands</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does not reside on Federal property</td>
<td>Is in U.S. Uniformed Service</td>
<td>D(i)</td>
<td>0.2</td>
</tr>
<tr>
<td></td>
<td>Foreign military officer and accredited foreign gov’t official</td>
<td>D(ii)</td>
<td></td>
</tr>
<tr>
<td>Resides in Low Rent Housing</td>
<td>Does not work on Federal property</td>
<td>E</td>
<td>0.1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>F</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Civilian who does not work on Federal property (NOT LRH)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Works on Federal property in same county as LEA</td>
<td>G(i)</td>
<td>0.05</td>
</tr>
<tr>
<td></td>
<td>Works on Federal property in same state as LEA</td>
<td>G(ii)</td>
<td></td>
</tr>
</tbody>
</table>
STEPS TO CONDUCT A SURVEY:

When – Picking an annual survey date
Who – Necessary collection information
How – Source Check vs Parent-Pupil surveys
Consider the following to choose the best annual survey date:

01 Date Range
Pick a date between the 4th day of school and January 30th (34 CFR 222.33)

02 Mandatory Count Date?
Does your state already have a mandatory count date?
If yes, is it convenient to survey for Impact Aid at the same time?

03 Fluctuating membership?
Does your federally-connected membership fluctuate over the year? Try to target your survey date when your federally-connected population is at its highest.
Who do I survey?

On the survey date, collect information about...

1. Total membership
   - Count the children enrolled in your school district ON THE SURVEY DATE

2. Tuition-in children
   - Count the children for which the LEA is receiving a tuition payment (whether Federally connected or not). These children will be subtracted from your LEA’s enrollment to determine membership.

3. Tuition-out children
   - Count the children for which the LEA pays another LEA to educate (whether Federally connected or not). These children will be added to your LEA’s enrollment to determine membership.

4. Federally-Connected children
   - Count the number of federally-connected children in your LEA’s membership

5. Children with an active Individualized Education Program (IEP)
   - Certain Federally connected children with active IEPs are eligible for additional special education dollars under Section 7003(d).
HOW DO I SURVEY?

1) Source Check Forms
Lists all children that the school district thinks are in a certain category
The LEA takes the form to a certifying official (not a parent) to verify and certify information as of the survey date.

2) Parent-Pupil Survey (PPS) Forms
Forms are sent to the parents (emailed and/or sent home with the students).
**HOW DO I CHOOSE?**

**Source Check Form:**
- Suggested for children residing on Indian lands or low rent housing.

**Pros:**
1. One form captures all the children for that property.
2. Easy to use and deliver.

**Cons:**
1. Burdensome for certifiers.
2. Requires planning and cooperation with certifiers.

**PPS Form:**
- Suggested for civilian and uniformed services membership.

**Pros:**
1. Best way to count children that you cannot get a certifier to sign (e.g. military does not generally like to sign source checks).

**Cons:**
1. May involve a lot of paper
2. Delivery system is mostly children
3. The rate of return can be low
FAQ’S ANSWERED

Can I use both types of forms?

YES

Many LEAs have different types of children and may use a PPS survey for one category and a source check for another.

Does paper need to be involved?

NO

For more information about Electronic Data Collection: https://impactaid.ed.gov/resources/#edc
## SOURCE CHECK INFORMATION

### Essential Components of all Source Checks:
- Parent Name
- Name of federal property
- Child’s Name
- Child’s Grade

### Category-Specific Components:

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indian Lands</td>
<td>Address of the individual property. BIA prefers the use of legal descriptions or tract numbers.</td>
</tr>
<tr>
<td>IEP</td>
<td>If the student has an ACTIVE IEP on the survey date, put the IEP date in the IEP Column.</td>
</tr>
<tr>
<td>Certifications</td>
<td>You must have your source checks signed EVERY YEAR!!!</td>
</tr>
<tr>
<td>Low Rent Housing</td>
<td>You must include the property address for each child &amp; the Asset Management Project number for that property.</td>
</tr>
</tbody>
</table>
SOURCE CHECK CREATION

Remember: One Source Check per Property per Category!

For children that reside on trust property, you need:
- Category C Source Check

For children’s parents who work for Cherokee Nation, you need:
- Category G Source Check for Cherokee Nation (employer)

***Children living on Indian lands receive the maximum weight in the payment formula. You will not get additional funds for showing that the parent also works on Indian lands.***

For civilian employees on Ft. Hood working for SAIC and General Dynamics, you need:
- Category G Source Check for SAIC
- Category G Source Check for General Dynamics

For military that lives on Quantico & military that live outside Quantico, you need:
- Category B source check (living on base)
- Category D(i) source check (living off base)
WHICH INDIAN LANDS SOURCE CHECK IS RIGHT FOR YOU?

1. Trust or Restricted
   Most common Indian lands property type. If the land is held in trust or has restrictions on the sale or mortgage of the property, this is the right form.

2. OK Tribal Treaty Land
   Housing owned by an IHA and provided as Low-Income Housing

3. ANCSA
   Land conveyed under the Alaska Native Claims Settlement Act.
# TRUST OR RESTRICTED INDIAN LANDS

## SOURCE CHECK

For children who reside on these Indian Lands, must include:

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<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Name of the federal property</td>
<td>4.</td>
<td>Trust or restricted</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(e.g. Trust properties Cheyenne River- Eagle Butte, SD)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>Parent name</td>
<td>5.</td>
<td>Child’s name and grade</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>Address/Legal Description/ Tract # for the child’s residence</td>
<td>6.</td>
<td>IEP date (only if the child has an IEP)</td>
<td></td>
</tr>
</tbody>
</table>

U.S. DEPARTMENT OF EDUCATION
CERTIFICATIONS FOR SOURCE CHECK

Trust or Restricted Certifications

1. BIA / Tribal Official
   Certifies the land is trust or restricted

2. Tribal Official
   Certifies the child resided on Indian lands on the survey date

3. LEA Official
   Certifies the child was enrolled in the LEA on the survey date

4. Special Ed Coordinator
   Certifies that the child had an active IEP on the survey date
OK TRIBAL TREATY INDIAN LANDS
SOURCE CHECK

For children who reside on these Indian Lands, must include:

1. Name of the federal property
   (e.g. Choctaw Housing- Ada, OK)
2. Name / Phone # of the Indian Housing Authority
3. Address of Federal property
4. Low-Income Housing Type
   (e.g. Tribal Housing Assistance, NAHASDA, Mutual Help/HOPE, Housing Act of 1937)
5. Parent’s name
6. Child’s name
7. Child’s residential address
8. Child’s grade
9. IEP date (only if the child has an IEP)
ANCSA INDIAN LANDS SOURCE CHECK

For children who reside on ANCSA lands, must include:

1. Name of the federal property (e.g. ANCSA Properties- Eek Village)
2. Legal description of the property
3. Parent name
4. Address/Legal Description (BIA/BLM can only verify legal descriptions)
5. Child’s name and grade
6. IEP date (only if the child has an IEP)
CERTIFICATIONS FOR SOURCE CHECK

3 ANCSA Certifications

- **BIA / Tribal Official (Land Status)**
  - BIA/BLM, Local ANCSA Corporation
  - Certifies the land was conveyed under ANCSA

- **Tribal/Village Council Official (Residence)**
  - Tribal / Village Council Official
  - Certifies the child resided on ANCSA Indian lands the survey date

- **LEA (Enrollment)**
  - LEA Official
  - Certifies the child was enrolled in the LEA on the survey date

- **SPED Director (IEP Date)**
  - Special Ed Coordinator
  - Certifies that the child had an active IEP on the survey date
Eligible low rent housing for Impact Aid:

**ONLY “traditional” public housing funded under the Housing Act of 1937**

**DO NOT** include Annual Contributions Contract (ACC), Housing Choice Voucher Program (HCVP), Residential Assistance Demonstration (RAD), Section 8, Low Income Tax Credit (LITC) Housing, Market Rate housing, or privately-owned housing.
LOW RENT HOUSING SOURCE CHECK

Low Rent Housing (LRH)
For children who reside on LRH, must include:

1. Name of the federal property
   (e.g. Red Robbin Apartments, Brooklyn, NY)
2. Asset Management Project (AMP)
   Number issued by HUD
3. Parent’s name
4. Child’s name
5. Child’s residential address
6. Child’s grade
Low Rent Housing Certifications

Public Housing Authority Official Certifies:
1) The property is funded under the Housing Act of 1937
2) The children listed above resided on this property on the survey date.

LEA Official
Certifies the child was enrolled in the LEA on the survey date.

PHA Official
(Type of property, child’s residence)

LEA (Enrollment)
EXAMPLE OF A PARENT PUPIL SURVEY

The LEA creates its own forms, but we have samples available to download at:
https://impactaid.ed.gov/resources/#survey
All forms **MUST** include the following information:

By signing and dating this form, I am certifying that all typed and written information on this form is accurate and complete as of the survey date.

Signature of Parent/Guardian_________________________________________ Date________________


**Category-Specific Components:**

1. Child’s info
2. Parent’s employment info
3. Active-Duty Uniformed Service info
REQUIRED CHILD INFORMATION FOR PPS

For parent pupil surveys, must include:

1. Name of child
2. Home address (no P.O. boxes)
3. Date of birth
4. Name of public school
5. Child’s grade
6. Name of federal property on which the child resides (if applicable)
REQUIRED PARENT INFORMATION FOR PPS

2. Parent’s Employment Information

For parent pupil surveys, must include:

1. Name of the parent or guardian employed on Federal property
2. Name of employer
3. Name and complete address of the Federal property (no P.O. boxes)
REQUIRED UNIFORMED SERVICES INFORMATION FOR PPS

3. Active-Duty Uniformed Services Information

For parent pupil surveys, must include:

1. Name of Parent
2. Rank, Pay Grade, or MOS of parent
3. Branch of service of parent
4. Country of Service
   (if the parent is both an Accredited Foreign Government Official AND a Foreign Military Officer)

- *National Guard members must provide copies of orders to show they are called up under Title 10*
MULTIPLE CHILD SURVEY FORM

Pros
- Less time tracking down signatures or incomplete forms

Cons
- MUCH more difficult to count
  - Parent fills out one form for all students in the household
  - Requires a very good system for removing duplicates
How to sort and report children on the application

Do’s and don’ts; Important reminders
SORT CHILDREN

Sort Children by Category
- Group military children that live on base together, then group military children that do not
- Group LRH children together
- Group Indian lands children together

Sort Category by Property
- Group military on Ft. Sill together
- Group military on Tinker AFB together

Count Children by Property
- Count all the children that live and work on Ft. Sill
- Count how many of those children had an IEP

Report Children on Application
Report these children on your application
COMMON ISSUES FOUND IN MONITORING

- F&G Eligibility – Not enough children to be eligible for payment
- No Supporting Documentation for Application Data
- Incomplete Forms – Missing Required Information
- Source Check Certification – Missing, or Wrong Person Signed
- IEP Date After Survey Date
- National Guard and Reservists – missing orders showing active on the survey date under Title 10 (Federal/Presidential service)
### DO’S & DON’TS

<table>
<thead>
<tr>
<th>Source Check Forms</th>
<th>Parent-Pupil Survey Forms</th>
<th>General</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLAN!!!</td>
<td>Send forms a few days after survey date to avoid bad dates</td>
<td>Check data for completeness</td>
</tr>
<tr>
<td>Establish relationships with certifiers</td>
<td>Pre-Print forms to help avoid missing information</td>
<td>Get parents to correct missing information ASAP</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Source Check Forms</th>
<th>Parent-Pupil Survey Forms</th>
<th>General</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do NOT wait until the last minute</td>
<td>Do NOT change forms after a parent has signed</td>
<td>Do NOT estimate child counts</td>
</tr>
<tr>
<td>Do NOT use the wrong form</td>
<td>Do NOT pre-print a signature date</td>
<td>Do NOT send only the signature page- send whole form.</td>
</tr>
</tbody>
</table>
IMPORTANT REMINDERS

- Survey every year!!
- Do not estimate child counts
- Do not include incomplete forms in your count
- Do not alter forms after signatures
- Check how long certifiers need to sign documents
- Get started early!
- Keep documents for >3 years after receiving a final payment for FY (34 CFR 222.10)
QUESTIONS?

Sign up for our listservs (7002 and 7003), get survey resources, reference the program statute and regulations, and add an upcoming webinar to your calendar.

Contact your assigned analyst for more information.