



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

**Select
Survey
Date**

**Conduct
Survey**

Compile Data

**Submit
Application**
** In IAGS**

**IAP
Screening**

**Adjustments
Field Reviews
Amendments
Property Reviews**

**Receive
Payment**

Section 7003 Process



TO CONSIDER FOR YOUR LEA

Children that qualify for grant eligibility
&
Payment formula weights for categories



DOES MY LEA HAVE ENOUGH CHILDREN TO QUALIFY?

Basic Eligibility

OR

F & G 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

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

Student	Parent	Category	Weight
Resides on Federal property	Civilian who works on federal property in the LEA	A(i)	1.0
	Foreign military officer & accredited foreign gov't official	A(ii)	
	Is in U.S. Uniformed Service	B	
Resides on Indian Lands		C	1.25
<u>Does not</u> reside on Federal property	Is in U.S. Uniformed Service	D(i)	0.2
	Foreign military officer and accredited foreign gov't official	D(ii)	
Resides in Low Rent Housing	Does not work on Federal property	E	0.1
Resides on Federal property	Civilian who does not work on Federal property (NOT LRH)	F	0.05
<u>Does not</u> reside on Federal property	Works on Federal property in same county as LEA	G(i)	
	Works on Federal property in same state as LEA	G(ii)	



STEPS TO CONDUCT A SURVEY

When – Picking an annual survey date

Who – Necessary collection information

**How – Source Check vs Parent-Pupil
surveys**



WHEN DO I SURVEY?

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 <u>IS RECEIVING</u> 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 <u>PAYS</u> 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).



TWO ACCEPTABLE FORMS

Source Check Forms

Lists all children that the school district thinks are in a certain category, then LEA takes the form to a certifying official (Partner in Action) to certify information as of the survey date.

AND/
OR

Parent-Pupil Survey (PPS) Forms

Forms are sent to the parents (emailed and/or sent home with the students).

WORKS BEST FOR: children living on Indian lands & Low rent housing

WORKS BEST FOR: parents in the military or working on Federal property

Impact Aid Program Source Check Form					
Category E					
Parent Resides in Low Rent Housing					
LEA Name:		Impact Aid Number:			
Survey Date:		School Year:			
AMP Number: _____					
Name of the Housing Development : _____					
1	2	3	4	5	6
Parent/Guardian Last Name	Parent/Guardian First	Student's Last Name	Student's First Name	Housing Address	Grade

SAMPLE		Impact Aid Program Survey Form		SAMPLE	
The survey date is _____					
All boxes must be filled in with complete information if applicable					
STUDENT INFORMATION					
Student's Last Name	First Name	M.I.	Date of Birth	Grade	Student's Name
Address			City	State	Zip Code
If the above property is a federal property, enter the name of the property: _____					
Fill in the above boxes with complete and accurate information					
PARENT/GUARDIAN EMPLOYMENT INFORMATION: CIVILIAN					
Enter information in this section regarding the parent/guardian if 1) neither parent/guardian with whom the student resided was on active duty in the Uniformed Services of the United States and 2) either parent/guardian with whom the student resided was employed on federal property, or 3) either the parent/guardian reported to work on federal property on the survey date. Enter the parent/guardian's name as it appears on the employer's payroll record.					
Parent/Guardian's Last Name	First Name and M.I.	Name of Parent/Guardian's Employer			
Address of Parent/Guardian's Employer			City	State	Zip Code
Name of federal property: _____					
Address of federal property			City	State	Zip Code
Fill in the above boxes with complete and accurate information					



HOW DO I CHOOSE?



Source Check Form:

suggested for children residing on Indian lands or low rent housing.

PPS Form:

suggested for civilian and uniformed services membership.

PROS:

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

- 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 Burdensome for certifiers.
- 2 Requires planning and cooperation with certifiers.

- 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?

For more information about Electronic Data Collection:

<https://impactaid.ed.gov/resources/#edc>

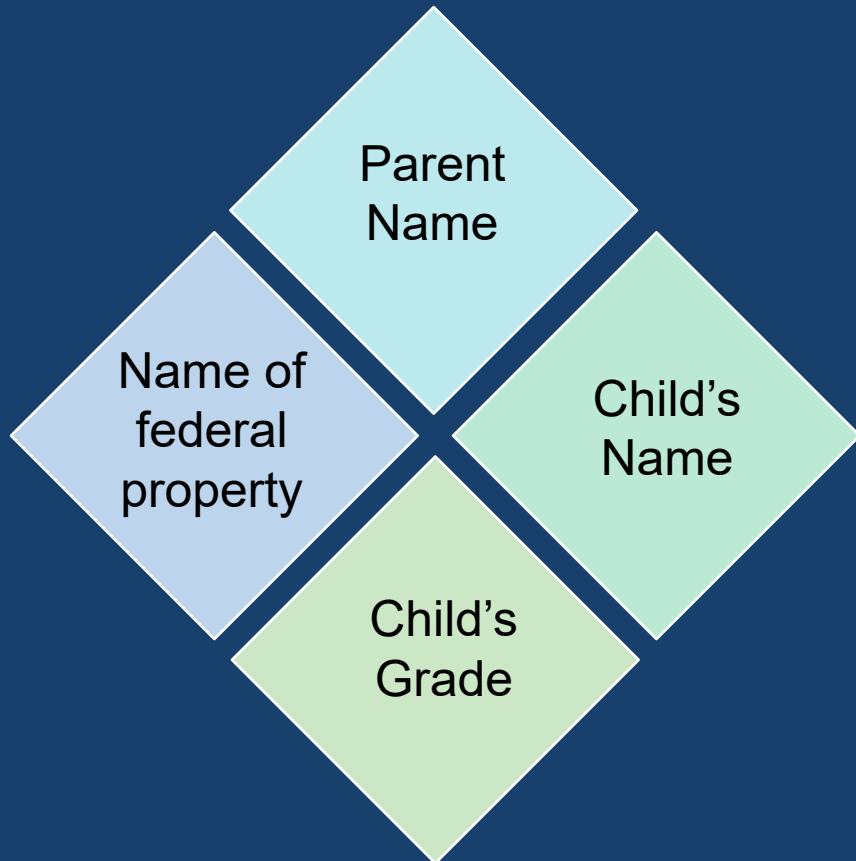


NO



SOURCE CHECK INFORMATION

Essential Components of all Source Checks:



Category-Specific Components:

Indian Lands

Address of the individual property.
BIA prefers the use of legal descriptions or tract numbers.

IEP

If the student has an ACTIVE IEP on the survey date, put the IEP date in the IEP Column.

Certifications

You must have your source checks signed EVERY YEAR!!!

Low Rent Housing

You must include the property address for each child & the Asset Management Project number for that property.



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

1

Trust or Restricted

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

Impact Aid Program Source Check Form							
Category C Children							
Children who Reside on Eligible Trust or Restricted Indian Lands							
LEA Name: DC Public Schools				Impact Aid Number: 123456			
School Year: 2020-21				Survey Date: 10/11/2020			
Federal Property on Which the Parent Resides: Address or Legal Description							
1	2	3	4	5	6	7	8
Parent/Guardian Last Name	Parent/Guardian First Name	Address, Legal Description or Tract #	Trust or Restricted "R" (not Lease)	Student's Last Name	Student's First Name	Grade	IEP Date
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							

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



CERTIFICATIONS FOR SOURCE CHECK

1

Trust or Restricted Certifications

BIA / Tribal
Official
(Land Status)

Tribal
Official
(Residence)

LEA
(Enrollment)

SPED Director
(IEP Date)

BIA/Tribal Official

Certifies the land is
trust or restricted

Tribal Official

Certifies the child
resided on Indian
lands on the survey
date

LEA Official

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

Special Ed Coordinator

Certifies that the child had
an active IEP on the
survey date



OK TRIBAL TREATY INDIAN LANDS SOURCE CHECK

2 OK Tribal Treaty

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

Impact Aid Program Source Check Form						
Category C: Children						
Children Who Reside in OK Tribal Treaty Housing						
LEA Name: DC Public Schools			Impact Aid Number: 123456			
School Year: 2020-21			Survey Date: 10/11/2020			
Federal Property on Which the Parent Resides (Include Project #):						
Name of the Indian Housing Authority (IHA):						
IHA Phone Number:			Low Income Funding Program:			
Address or Legal Description:						
Examples: Tribal Housing Assistance, NAHASDA, Mutual Help/HOPE, Housing Act of 1937						
1	2	3	4		7	
Parent/Guardian Last Name	Parent/Guardian First Name	Address, Legal Description, or Tract #	Student's Last Name	Student's First Name	Grade	IEP Date
1						
2						
3						
4						
5						

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

3 ANCSA

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)

Impact Aid Program Source Check Form						
Category C Children						
Children Who Reside on ANCSA Land (Alaska Only)						
LEA Name: DC Public Schools			Impact Aid Number: 123456			
School Year: 2020-21			Survey Date: 10/11/2020			
Townsite or Village of ANCSA Property:						
Legal Description, Interim Conveyance or Patent Number:						
1	2	3	4	5	6	7
Parent/Guardian Last Name	Parent/Guardian First Name	Address, Legal Description or Tract	Student's Last Name	Student's First Name	Grade	IEP Date
1						
2						
3						
4						
5						
6						



CERTIFICATIONS FOR SOURCE CHECK

3

ANCSA Certifications

BIA / BLM
ANCSA Corp
(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



LOW RENT HOUSING SOURCE CHECK



**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:

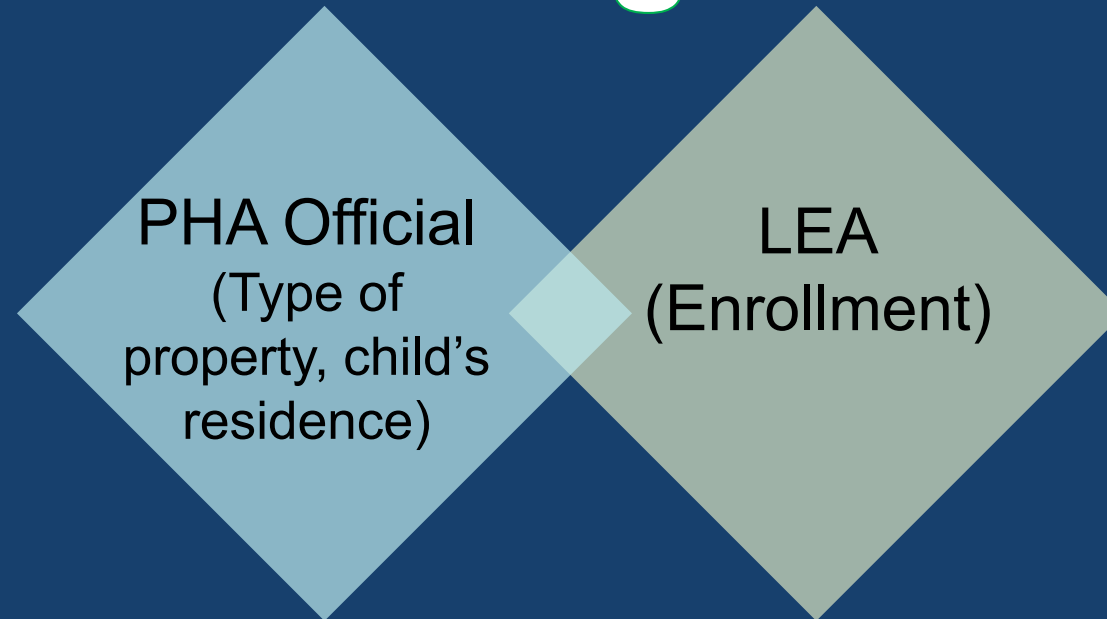
1. Name of the federal property
(e.g. Red Robbin Apartments, Brooklyn, NY)
2. Asset Management Project (AMP)
Number issued by HUD
3. Parent's name
4. Child's name
5. Child's residential address
6. Child's grade
7. IEP date (only if the child has an IEP)

Impact Aid Program Source Check Form					
Category E Children					
Parent Resides in Low Rent Housing					
LEA Name: DC Public Schools		Impact Aid Number: 123456			
School Year: 2020-21		Survey Date: 10/11/2020			
Name of the Housing Development:					
Asset Management Project (AMP) Number:					
1	2	3	4	5	6
Parent/Guardian Last Name	Parent/Guardian First Name	Student's Last Name	Student's First Name	Housing Address	Grade
1					
2					
3					
4					
5					



CERTIFICATIONS FOR LRH

Low Rent Housing Certifications



PHA 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



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>

SAMPLE		Impact Aid Program Survey Form		SAMPLE	
The survey date is _____					
All boxes must be filled in with complete information if applicable					
STUDENT INFORMATION					
Student's Last Name	First Name	M.I.	Date of Birth	Grade	School Name
Address		City	State	Zip Code	
If the above property is a federal property, enter the name of the property		Name of federal property			
Fill in the above boxes with complete and accurate information					
PARENT/GUARDIAN EMPLOYMENT INFORMATION: CIVILIAN					
Enter information in this section regarding the parent/guardian if 1) another parent/guardian with whom the student resided was on active duty in the Uniformed Services of the United States and 2) either parent/guardian with whom the student resided was employed on federal property, or 3) either the parent/guardian reported to work on federal property on the survey date. Enter the parent/guardian's name as it appears on the employer's payroll record.					
Parent/Guardian's Last Name	First Name and M.I.	Name of Parent/Guardian's Employer			
Address of Parent/Guardian's Employer		City	State	Zip Code	
Name of federal property					
Address of federal property		City	State	Zip Code	
Fill in the above boxes with complete and accurate information					
PARENT/GUARDIAN EMPLOYMENT INFORMATION: UNIFORMED SERVICES					
Enter information in this section regarding the parent/guardian if either person was on active duty in the Uniformed Services of the United States on the survey date.					
Parent/Guardian's Last Name	First Name and M.I.	Branch of Service	Rank		
Fill in the above boxes with complete and accurate information					
PARENT/GUARDIAN EMPLOYMENT INFORMATION: FOREIGN MILITARY					
Enter information in this section regarding the parent/guardian if either person was both an accredited foreign government official and a foreign military officer on the survey date.					
Parent/Guardian's Last Name	First Name and M.I.	Branch of Service	Rank		
Name of Foreign Government					
Fill in the above boxes with complete and accurate information					
This information is the basis for payment to your school district of federal funds under the Impact Aid Program (Title VII of the Elementary and Secondary Education Act), and may be provided to the U.S. Department of Education if your school district's application for payment is audited. This form must be signed and dated for your school district to receive funds based on this information.					
* By signing 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 _____		



PARENT PUPIL SURVEY REQUIREMENTS

All forms **MUST** include the following information:

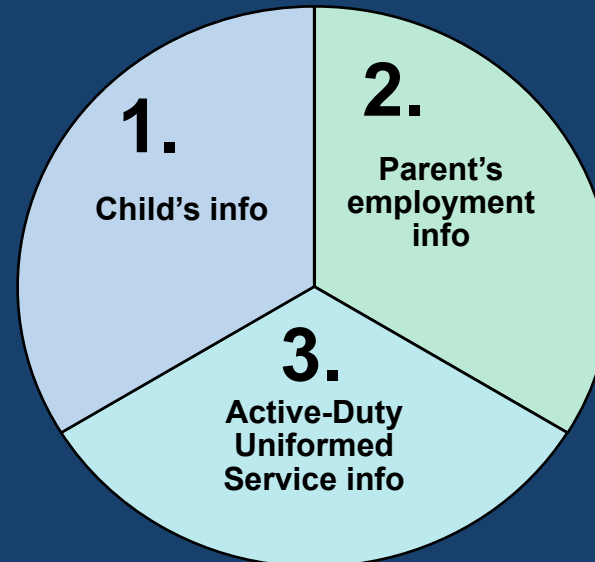
By signing and dating this form, I am certifying that all typed and written information on this form is accurate and complete as of the survey date.

Signature of Parent/Guardian _____ Date _____

Signature of
Parent and Date on
or after survey
date

Electronic signatures? See “Surveying Flexibilities”: https://impactaid.ed.gov/wp-content/uploads/2020/10/IAP_Surveying_Flexibilities.pdf

Category-
Specific
Components:



REQUIRED CHILD INFORMATION FOR PPS

1

Child's information

For Parent Pupil Surveys, must include:

STUDENT INFORMATION

Student's Last Name	First Name and M.I.	Date of Birth	Grade	School Name
Home Address (No P.O. Boxes)		City	State	Zip Code
If the student lives on federal property, enter the name of the property.		Name of federal property		

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:

PARENT/GUARDIAN EMPLOYMENT INFORMATION: EMPLOYED ON FEDERAL PROPERTY

Enter information in this section regarding the parent/guardian with whom the student resides if either person was employed on federal property or reported to work on federal property *on the survey date*. Enter the parent/guardian's name as it appears on the employer's payroll record.

Parent/Guardian's Last Name	First Name and M.I.	Name of Parent/Guardian's Employer	
Name of federal property			
Address of federal property		City	State Zip Code

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 of parent
3. Branch of service of parent

PARENT/GUARDIAN EMPLOYMENT INFORMATION: ACTIVE DUTY UNIFORMED SERVICES

Enter information in this section regarding the parent/guardian if either person was *on active duty* in the Uniformed Services *on the survey date*. This does not include members of the National Guard activated for State service under Title 32.

Parent/Guardian's Last Name	First Name and M.I.	Branch of Service	Rank
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PARENT/GUARDIAN EMPLOYMENT INFORMATION: FOREIGN MILITARY

Enter information in this section regarding the parent/guardian if either person was both an accredited foreign government official and a foreign military officer *on the survey date*.

Parent/Guardian's Last Name	First Name and M.I.	Branch of Service	Rank
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Name of Foreign Government

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

*Reservists must provide copies of orders showing they were on active duty on the survey date



MULTIPLE CHILD SURVEY FORM

Pro

Less time
tracking down
signatures or
incomplete
forms

Con

MUCH more
difficult to
count

- Parent fills out one form for all students in the household
- Requires a very good system for removing duplicates

STUDENT INFORMATION

Student's Last Name	First Name and M.I.	Date of Birth	Grade	School Name
Home Address (No P.O. Boxes)		City	State	Zip Code
If the student lives on federal property, enter the name of the property.		Name of federal property		



ADDITIONAL CHILDREN ENROLLED IN THE SCHOOL DISTRICT WHO RESIDE AT THE HOME ADDRESS ABOVE

Student's Last Name	First Name and M.I.	Date of Birth	Grade	School Name
Student's Last Name	First Name and M.I.	Date of Birth	Grade	School Name



AFTER COLLECTING SURVEY DATA:

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



Source Check Forms

PLAN!!!

Establish relationships with certifiers

Parent-Pupil Survey Forms

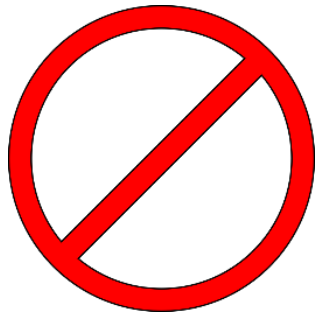
Send forms a few days after survey date to avoid bad dates

Pre-Print forms to help avoid missing information

General

Check data for completeness

Get parents to correct missing information ASAP



Source Check Forms

Do NOT wait until the last minute

Do NOT use the wrong form

Parent-Pupil Survey Forms

Do NOT change forms after a parent has signed

Do NOT pre-print a signature date

General

Do NOT estimate child counts

Do NOT send only the signature page- send whole form.



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)





IMPACT AID PROGRAM
202-260-3858
IMPACT.AID@ED.GOV
<https://impactaid.ed.gov>



U.S. DEPARTMENT OF EDUCATION

QUESTIONS?

Sign up for our listserv ([7002](#) & [7003](#)), get survey resources ([sample source check & PPS forms](#)), learn about [regulations](#), and see upcoming webinars!

[Email your analyst for more information](#)