Which Vehicle?

1. Minivan

2. 4-door sedan

3. Sports car

4. SUV/4x4 truck
THE RELATOR
- Warm and friendly
- Slow and easy
- Shares feelings
- Good listener
- Cooperative

THE SOCIALIZER
- Relationships important
- Strong feelings of personal worth
- Fast-paced
- Enthusiastic and persuasive
- Not afraid of risks

THE THINKER
- An efficient perfectionist
- Slow and cautious
- Task-oriented
- Follows directions
- Works well alone

THE DIRECTOR
- Emphasis on results
- Little concern for relationships
- Does not share feelings
- Seen as dominating
- Fast-paced and decisive

Source: https://www.evolution-coaching.com/
Agenda

• President’s Report
• Treasurer’ Report
• Tipping Points Survey – Preliminary Results
• Board Elections
• Reauthorization
• Finance Survey Results
• Washington Update
• Finance Task Force
• Leadership Transition
• State Challenges
The boss says 'Go'; the leader says 'Let's go!'  
Harry Gordon Selfridge
L is for Learn

“Tell me and I forget.
Teach me and I remember.
Involve me and I learn.”

- Benjamin Franklin

Pam Thomas, Missouri President
LEADERSHIP
A GREAT LEADER CHOOSES THE PATH OTHERS WILL FOLLOW.

President’s Report
2018 Priorities

1. Task Forces

2. Activities

3. Cross-cutting Theme
   - ACEs
   - Transition to 619
   - Workforce Development
   - Increased Child Count
Accomplishments

1. Work with OSEP and TA Partners
2. Letters of Support
3. ITCA Comments
Partnerships

1. OSEP

2. Early Childhood

3. Home Visiting
Treasurer’s Report
E is for Example

“\textquote{It is better to lead from behind and to put others in front, especially when you celebrate victory when nice things occur...}”

- Nelson Mandela

Carl Beck, Pennsylvania Secretary/Treasurer & Vice President
## 2018 Budget/Expenditures as of 7/31/18

<table>
<thead>
<tr>
<th>Category</th>
<th>Budgeted</th>
<th>Actual</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Meeting</td>
<td>$15,000.00</td>
<td>$10,000.00</td>
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<tr>
<td>Board Planning Retreat</td>
<td>$5,000.00</td>
<td>$5,596.63</td>
<td>111.9%</td>
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<tr>
<td>Executive Director</td>
<td>$56,842.00</td>
<td>$33,157.81</td>
<td>58.3%</td>
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<tr>
<td>Governmental Liaison</td>
<td>$42,162.00</td>
<td>$24,594.50</td>
<td>58.3%</td>
</tr>
<tr>
<td>Travel</td>
<td>$15,000.00</td>
<td>$0.00</td>
<td>0.0%</td>
</tr>
<tr>
<td>Web Maintenance</td>
<td>$500.00</td>
<td>$125.00</td>
<td>25%</td>
</tr>
<tr>
<td>Web Server</td>
<td>$1,200.00</td>
<td>$700.00</td>
<td>58.3%</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>$1,000.00</td>
<td>$0.00</td>
<td>0.0%</td>
</tr>
<tr>
<td>Conference Calls</td>
<td>$500.00</td>
<td>$567.10</td>
<td>113.4%</td>
</tr>
<tr>
<td>Directors and Officers Insurance</td>
<td>$1,700.00</td>
<td>$1,696.00</td>
<td>99.8%</td>
</tr>
<tr>
<td>Association Membership Fees</td>
<td>$700.00</td>
<td>$650.00</td>
<td>92.9%</td>
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<tr>
<td>Committee Activities/Products</td>
<td>$4,000.00</td>
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<tr>
<td>Other:</td>
<td>$500.00</td>
<td>$2,239.56</td>
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<tr>
<td><strong>Total</strong></td>
<td>$144,104.00</td>
<td>$79,049.54</td>
<td>55.2%</td>
</tr>
</tbody>
</table>
Cash on Hand

- Savings Account: $110,210.47
- Checking Account: $10,313.88
- CD Account: $10,000.00
- Total: $130,524.35
Membership

2007: 53
2008: 49
2009: 49
2010: 44
2011: 49
2012: 47
2013: 47
2014: 50
2015: 52
2016: 47
2017: 45
2018: 50
## 2019 Proposed Budget

<table>
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<tr>
<th>Category</th>
<th>Budgeted</th>
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<td>Annual Meeting</td>
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<td>Committee Activities/Products</td>
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<td>Other:</td>
<td>$500.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$144,104.00</strong></td>
</tr>
</tbody>
</table>
Tipping point: When small things make a big difference

Recognize the point. Make the adjustment. See & live the difference.

-ERIC & MALEKA BEAL

2018 Tipping Points Survey
Preliminary Results
A is for Attitude

“Luck is what happens when preparation meets opportunity.”

- Seneca

Nathan DeDino, Ohio Director at Large
Respondents

44 States

Lead Agency:
- Health – 36.4%
- Education – 22.7%
- Other – 40.9%

Eligibility:
- Category A – 40%
- Category B – 40%
- Category C – 20%
Participation in Part C

- No discussions related to dropping out of Part C: 84.6%
  - Prepared documents related to benefits of participation or loss of federal funding: 7.7%
- What issue could cause you to drop out?
  - State budget availability: 54.5%
  - Changes in federal funding: 18.2%
- My state will continue to participate in Part C through June 30, 2019: 92.5%
Changes made in last 12 months

- Made change in Medicaid State Plan to increase coverage for Part C: 21.4%
- Added autism coverage to Medicaid state plan: 14.3%
- Required prior approval for hours of service that exceed a specified amount: 14.3%
- Reduced provider reimbursement: 14.3%
Changes to be made in next 12 months

- **Make**
  - change in Medicaid State Plan to increase coverage for Part C: 25%

- **Develop**
  - legislation related to the use of private insurance: 10.7%

- **Add**
  - autism coverage to Medicaid state plan: 3.6%

- **Reduce**
  - provider reimbursement: 3.6%

- **Require**
  - prior approval for hours of service that exceed a specified amount: 3.6%
Planned vs. Delivered Services
Length of Stay in Program
Median Age at Referral

2017: 17.6
2018: 17.5

Median Age at Referral
### Status Reports

#### No changes in eligibility: 87.5%

##### Funding:
- Funding increased: 47.1%
- Funding frozen: 35.3%

##### Provider reimbursement:
- Rates remained the same: 62.5%
- Increased rates: 15%
- Decreased rates: 10%

#### Provider Shortages
- 90% of states
Provider Shortages

- Speech-language Pathologists: 86%
- Physical Therapists: 78%
- Occupational Therapists: 69%
- Special Educators: 42%
- Vision Specialists, including...: 36%
- Audiologists: 31%
- Psychologists: 31%
- Orientation and mobility Specialists: 25%
- Registered Dietitians: 25%
- Social Workers: 25%
- Nurses: 22%
- Family Therapists: 17%
- Orientation and mobility Specialists: 0%
Adverse Childhood Experiences

- Extensive Efforts
- Some Efforts
- Beginning to Address
- Not at this time

<table>
<thead>
<tr>
<th>Condition</th>
<th>Extensive Efforts</th>
<th>Some Efforts</th>
<th>Beginning to Address</th>
<th>Not at this time</th>
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<td>NAS</td>
<td>30%</td>
<td>37.50%</td>
<td>30%</td>
<td>37.50%</td>
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<tr>
<td>Zika</td>
<td>32.50%</td>
<td>45%</td>
<td>15%</td>
<td>5%</td>
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<tr>
<td>Lead Poisoning</td>
<td>25.60%</td>
<td>15.40%</td>
<td>7.50%</td>
<td>15.40%</td>
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<tr>
<td>FASD</td>
<td>45%</td>
<td>27.50%</td>
<td>15%</td>
<td>22.20%</td>
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<tr>
<td>Other</td>
<td>30%</td>
<td>22.20%</td>
<td>15%</td>
<td>22.20%</td>
</tr>
</tbody>
</table>
D is for Decisive

“The needs of the many outweigh the needs of the few or the one.”

- Spock

Jill Singer, N. Carolina Director at Large
“A leader is one who knows the way, goes the way, and shows the way.”

John C. Maxwell

Board Elections
E is for Encourage

“Successful leaders see the opportunities in every difficulty rather than the difficulty in every opportunity.”

Christina Commons, Indiana Vice President/ President Elect

- Reed Markham
R is for Responsibility

“The consequence of not adequately training your Huns is their failure to accomplish that which is expected of them.”

- Attila the Hun

Allan Phillips, DC
Secretary/Treasurer
S is for Service

“The good you do today, people will often forget tomorrow... Do good anyway. Give the best you have, and it will never be enough... Give your best anyway.”

- Mother Teresa

Dan McGrath, Texas Director at Large
A is for Again

“If at first you don't succeed, try, try, try again.”

- Thomas H. Palmer

Nathan DeDino, Ohio Director at Large
“If your actions inspire others to dream more, learn more, do more and become more, you are a leader.”

- John Quincy Adams
Money is not the only answer, but it makes a difference.
Barack Obama
Participant Demographics

- Data from 51 States and Jurisdictions

- Lead Agency:
  - Education: 11 states
  - Health: 21 states
  - Other: 19 states

- Eligibility Criteria:
  - Category A: 17 states
  - Category B: 22 states
  - Category C: 12 states
Reported Part C Funding
$3,997,608,208
Funding Distribution

Total Funding: $2,139,864,862

- Local Funding: $314,600,200
- Federal Funding: $1,543,143,146
- State Funding: $2,139,864,862

Diagram showing distribution of funding percentages.
| State Part C Appropriation                  | $1,111,559,544 |
| State General Funds:                        | $853,941,983  |
| State Special Education                     | $142,398,102  |
| State TANF MOE:                             | $10,200,000   |
| Tobacco Funds:                              | $8,103,393    |
| State Dev Dis:                              | $5,700,000    |
| State Mental Health:                        | $5,412,640    |
| Deaf Blind Funds:                           | $2,546,200    |
| State CSHCN:                                | $3,000        |

**State Funds**
Local Funds

County Tax Levy: $125,585,979
Private Insurance: $81,264,289
LEA: $81,259,356
Local Government: $19,310,188
Family Fees: $4,730,654
United Way: $937,043
Cash: $720,512
Foundations: $431,400
Special Fundraising: $360,739
Data from 2018 ITCA Finance Survey
IFSP as Authorizing Document for Medical Necessity

Physician Signature Required

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>IFSP</td>
<td>25</td>
<td>10</td>
</tr>
<tr>
<td>Signature Required</td>
<td>9</td>
<td>25</td>
</tr>
</tbody>
</table>
Require Use of Private Insurance prior to Accessing Medicaid

Decline in Medicaid Revenue due to Parent Denial for Access
Family Cost Participation

- Private Insurance: 11
- Family Fees: 3
- Both: 12
Private Insurance

• 13 states have insurance legislation
• 5 states have a cap in their legislation
• 6 states have seen a decrease in revenue as a result of families denying access to insurance
SSIP Funding

Have You Determined How to Pay For:

- Implementation: 43%
- Sustaining: 24%
- Evaluating: 20%

How Are You Paying For SSIP Activities?

- New Funding: 11%
- Shifting Funding: 67%
- Haven’t Determined: 28%

Have You Determined How to Pay For:

- New Funding: 11%
- Shifting Funding: 67%
- Haven’t Determined: 28%
What New Costs Do You Have?

- Data System Changes: 76%
- Training and TA: 76%
- Evaluation: 41%
- Additional Personnel: 24%
- Purchase Materials: 24%
Types of Providers in Part C

- Non-Profit: 91%
- For Profit: 68%
- Independent Providers: 71%
- State Employees: 35%
- Municipal Employees: 26%
GREAT LEADERS DON’T SET OUT TO BE A LEADER... THEY SET OUT TO MAKE A DIFFERENCE. IT’S NEVER ABOUT THE ROLE—ALWAYS ABOUT THE GOAL.

LisaHaisha.com
Washington Update
"The most powerful leadership tool you have is your own personal example."

John Wooden
ITCA Reauthorization Initiative

- Board established a Task Force in July 2016
  - 24 members from 17 states
  - Co-led by Lynn Johnson (CT) and Kyla Patterson (VA)
- Built on 2013 workgroup work, including survey of members, development of principles and development of initial draft recommendations
- TF held monthly calls from July 2016 through October 2017
  - A small workgroup met to address issues related to transition in 2018
ITCA Reauthorization Initiative

• Member Input
  • Membership Meeting August 2016 – Considered Principles and Developed Priority Recommendations
  • Membership Meeting August 2017 – Discussed and gave feedback on draft recommendations
  • Member Survey on draft recommendations – June 2018
  • Membership Meeting August 2018 – Receive final draft and discuss several issues

• ITCA Board will consider and approve final document
Member Survey – Draft Recommendations

• Competed in June 2018
• 7 states responded
• Generally respondents agreed with recommendations
• A few wanted clarification and agreed to a particular recommendation as long as state discretion was available
• Appreciation to the task force was mentioned
• Some technical changes were offered
• 3 issues need your input today
ITCA Reauthorization Preliminary Recommendations

- ITCA Principles for Reauthorization
- Recommendations – 18 in total
  - Service Delivery includes 10 recommendations
  - Transition includes 1 recommendation
  - System Components includes 5 recommendations
  - Policy and Fiscal Matters includes 2 recommendations
- Each recommendation includes a citation, the recommendation and proposed statutory language
  - Strike outs for deletions
  - Underline for insertions
Discussion Item for Today

- Natural Environments – Section 632(4)(G)
- Evidence-based Practices – Section 635(a)(2) and Section 632
- CSPD – Section 635(a)(8)
ITCA Reauthorization
Next Steps

• Based on discussion today, any final revisions will be made to the document;
• Final draft will be considered, revised if necessary and approved by the Board at their September meeting;
• Preliminary Recommendations will be held until reauthorization activity begins; and
• Once reauthorization activity begins, ITCA will consider whether additional revisions need to be considered in these Preliminary Recommendations.
Money makes the world go round.

- Steve Jobs

Fiscal Leadership
Key Issues from Finance Think Tank

• Medicaid:
  • Improve use of funds,
  • Manage changing relationships with implementation of Medicaid

• Provider Issues:
  • Retention, rates,
  • Oversight of implementation of EI,
  • Reign in billing practices

• Program Challenges:
  • Better oversight of child outcomes,
  • Service delivery,
  • Manage child growth issues

• Support for EI:
  • Varied within ICC,
  • State Medicaid Office,
  • Other key State staff
Fiscal Initiative

• Four cohorts of states have completed the fiscal initiative
  • Cohort I: 10 states
  • Cohort II: 4 states
  • Cohort III: 5 states
  • Cohort IV: 6 states

• OSEP Support for initiative both programmatically and financially through authorization of TA Center funding:
  • ECTA
  • NCSI
Cohort V

- Connecticut
- Maine
- Massachusetts
- Montana
- Rhode Island
- Utah
Fiscal 101

Each module addresses a specific component of fiscal requirements, providing an overview of each topic. Throughout the modules there are links to all relevant policies and regulations.

http://ectacenter.org/topics/finance/fiscal101.asp
Leadership Transition Task Force
Key Issues from New Coordinator Orientation

• Single website with most critical information and resources

• Activities chart that can be modified

• Collegiality

• Shift in OSEP frame of thinking
2018: Part C Coordinator Demographics
Trend: Tenure of Part C Coordinators

- 5 years or less
- 6 years or more

Year:
- 2005 (Baseline)
- 2013
- 2014
- 2015
- 2016
- 2017
- 2018

Percentage:
- 61%
- 59%
- 60%
- 61%
- 67%
- 75%
- 73%
Previous Experience

- Worked in Part C Lead Agency: 51%
- Worked in Part C at Local Level: 59%
- Worked with individuals with disabilities at different ages: 28%
- Worked in Preschool: 14%
- Worked in lead agency, not Part C: 12%
- No related experience: 7%
Salary Range

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<tr>
<th>Salary Range</th>
<th>2005</th>
<th>2017</th>
<th>2018</th>
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</thead>
<tbody>
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<tr>
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<td>4%</td>
<td>5%</td>
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<tr>
<td>$51 - $60</td>
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<td>$61 - $70</td>
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<td>0%</td>
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<td>14%</td>
</tr>
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<td>$101 - $125</td>
<td>5%</td>
<td>11%</td>
<td>7%</td>
</tr>
<tr>
<td>$126+</td>
<td>0%</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>
Profile

Part C only responsibility: 66%

Percentage of Salary supported by other funds:

• 28% of coordinators report that 100% of their salary is supported by funds other than Part C federal funds.
• 42% of coordinators report that 100% of their salary is supported by Part C federal funds.

Highest Educational Degree:

• BA/BS: 30%
• Masters: 55%
• Doctorate: 5%
• Other: 11%
Supports Needed

- New Coordinator Toolkit: 84.6%
- Peer Mentoring/coaching from seasoned coordinator: 71.8%
- Customized Professional Development Plan: 71.8%
- Written guidance on reporting requirements: 66.7%
- Written guidance on available TA: 56.4%
- Meeting with OSEP within first year to discuss resources and requirements: 48.7%
Most Stressful Factors on Your Position

- Insufficient Funding for Services: 33
- Lack of Staffing at Lead Agency: 27
- Lack of Service Providers: 26
- SPP/SiMR Activities: 19 (Federal Reporting Requirements: 19)
- Other: 17

Other stress factors include:

- Lack of Service Providers
- SPP/SiMR Activities
- Federal Reporting Requirements
- Lack of Administrative Support
- Other
Sacramento Convening

- ITCA Representatives:
  - Brenda Knudson-Chouffi (NY)
  - Christy Cronheim (ID)
  - Charlene Robles (HI)
  - Heather Staab (KS)
  - Sharon DeRego (CA)
  - Julie Docter (NE) Jill Singer (NC)
  - Jeanne DuRivage (NM)
  - Maureen Greer

- OSEP Representatives:
  - Priscilla Irvine
  - Julia Martin Eiles

- DaSy:
  - Sherry Franklin

- ECPC:
  - Mary Beth Bruder
  - Darla Gundler

- ECTA:
  - Christina Kasprzak

- IDC:
  - Carolee Eslinger

- NCSI:
  - Ardith Ferguson
  - Virginia Reynolds
DC Convening

• ITCA Representatives:
  • Jill Singer (NC)
  • Christy Cronheim (ID)
  • Christina Commons (IN)
  • Allan Phillips (DC)
  • Dana McGrath (TX)
  • Jennifer Kauffman (RI)
  • Jeanne DuRivage (NM)
  • Maureen Greer

• OSEP Representatives:
  • Priscilla Irvine
  • Julia Martin Eiles

• DaSy:
  • Sherry Franklin
  • Kathy Hebbeler

• ECPC:
  • Mary Beth Bruder
  • Darla Gundler

• ECTA:
  • Christina Kasprzak
  • Sharon Walsh

• IDC:
  • Laura Taylor

• NCSI:
  • Ardith Ferguson
  • Virginia Reynolds

• NCPMI
  • Erin Barton
New Website

https://collab.osepideasthatwork.org/idea-part-c-part-b-coordinators
Two Additional Initiatives

• **Leadership Skills and Competencies**: ECPC, in collaboration with ECTA, is developing skills and competencies for early childhood leadership based on a literature review conducted by Carl Dunst. Representatives of the ITCA board and Leadership Transition will be convened to advise on the content this fall.

• **Navigating Transition** is an initiative of NCSI based on feedback from ITCA members that addresses initial support for new Part C Coordinators and includes the development of an individualized professional development plan.
Helping others is the way we help ourselves.

Oprah Winfrey

State Challenges/Issues for OSEP
The only way to do great work is to love what you do.

- Steve Jobs

Thank You for Attending Today