

ISA Level 1:

**Funding for Equipment for
Students with Special Needs**

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Purpose of ISA 1 Grant

The purpose of ISA 1 funding is to provide funding to school boards to assist with the costs of equipment essential to support students with special needs to access the Ontario curriculum or a board determined program, to attend school including being transported to and from school, and where the need for specific equipment is recommended or determined by a qualified professional.

Board Responsibilities for ISA 1 Funded Equipment

ISA 1 purchased equipment should be considered as a set of physical assets, which boards have a responsibility to protect, maintain, and manage as a public resource. It is assumed that boards will develop internal operating policies and procedures regarding the purchase, repair, use and disposal of equipment.

School boards are expected to make appropriate decisions about how best to meet the needs of students who require equipment to assist them. Informed decisions will support cost effective choices about acquiring appropriate equipment and ensuring it is meeting students' specific needs.

Boards' responsibility include ensuring that:

- equipment is functioning properly and is meeting students' needs;
- equipment is replaced as required, when students outgrow equipment or when equipment wears out through use;
- upgrades and refurbishment are considered before replacement as an option;
- equipment is reused by other students when no longer required by the student it was purchased for;
- efforts are made to share equipment among several students when appropriate and possible;
- policies are developed that provide board staff with direction on issues such as:
 - managing transfers between boards,
 - use of equipment in students' home, in co-op placements and in other program settings,
 - staff training on use of ISA 1 funded equipment,

- inventory records,
- documenting use of equipment in student's IEPs, where equipment is required to support the student;
- reasonable efforts are made to acquire a fair market value when disposing of used equipment.

Boards will need to internally allocate an adequate amount of other funding to support the other costs associated with ensuring that all students who need equipment have access to appropriate equipment. These other costs include the \$800 per pupil deductible, the purchase of equipment that costs less than \$800 for students who require low cost items, on-going insurance costs, consumables such as toner and paper for printers, the cost of parts for upgrading or refurbishing equipment and staff costs for managing equipment purchasing, set-up, repairs, and training.

Eligibility

Types of Boards/Organizations

ISA 1 funding is available to:

- district school boards
- district school authorities
- children's hospital school authorities

Types of Students

ISA 1 funding can be used to purchase equipment for any student with a special need, where the equipment is required to support the student's access to the Ontario curriculum and/or alternative program. Students need not be formally identified as an exceptional student, but their need for equipment must be recommended by a relevant qualified professional and evidence of the use of equipment must be documented in the student's Individual Education Plan (IEP) or in other program documentation.

Types of Equipment

Eligible expenses - Equipment

Eligible expenses include all costs associated with purchasing and/or leasing equipment to meet students' special education needs, as well as the related costs for peripherals, service contracts and training that are required to make equipment operational.

The types of equipment that are eligible for ISA 1 funding include any items that are recommended by a qualified professional. This allows for flexibility in purchasing to meet needs in innovative ways and to respond to new developments in technology and practice.

As the purpose statement indicates, eligible equipment includes items required to meet students' personal care and safety needs, such as lifts or car seats for school-provided transportation. These items support students in order that they can get to school and have access to their program.

Examples of eligible expenses include:

- speech analysers
- FM systems
- amplification systems
- print enlargers for students with low vision
- computer hardware/software
- adjustable desks or computer tables
- braille writers
- symbol or letter voice translators
- insulated booths and study carrels
- communication aids, such as speech synthesizers
- positioning devices for sitting, standing, and lying
- personal care items
- lifts or harnesses for moving students
- warranties
- service contracts for technology
- training for students and staff on how to use ISA 1 funded computers, software or other equipment

For students with central auditory processing difficulties, it is recommended that boards undertake a six month trial with suitable equipment, such as a soundfield system, has occurred and has shown positive results for the student, prior to ministry approval of a claim for hearing related equipment.

When leasing arrangements are made, the entire cost of the lease should be claimed in the first year – not as a pro-rated cost over the life of the lease. For example, a three-year lease at \$1000 per year would be claimed as \$3000 in the first year of the lease.

Claims may not be made for computer hardware when all students in the class would ordinarily be provided with computers.

Where equipment will be shared by several students, such as a Braille or printer, a claim should be made in the name of one student only.

Equipment that is required for teachers or other staff to interact with students as they access their course of study or program is also eligible for ISA 1 funding. This would include items such as microphones, lifting devices, safety vests or other protective gear.

Deductible

District school boards are responsible for the first \$800 in costs for any student per year. In processing a board's ISA 1 claims, the ministry will deduct \$800 from the total amount of ISA Level 1 funding claimed for a student in a school year. It is expected that boards will use other special education funding to cover the \$800 deducted from the ISA Level 1 claim.

School authorities are not required to pay the first \$800 in equipment expenses, because they are funded on a different basis. They may claim the full cost of each equipment purchase as part of their financial reporting to ministry district offices.

Eligible expenses - Technicians

New for 2004-05

As of 2004-05, the salary and benefit costs of board-employed technicians and technologists who manage ISA 1 equipment installation, maintenance and staff training is also eligible. District school boards may apply for no more than one technician/technologist per 30,000 students (as per board's ADE), with smaller boards eligible for a minimum of 0.2 FTE. Eligible salaries would be consistent with other board IT technician positions. School authorities are not eligible to claim this expense, but may claim for external service contract costs related to equipment maintenance and repairs.

Boards may also claim expenses related to service contracts with external vendors. This may be claimed as part of an order for new equipment, or as a separate item that would cover a number of pieces of existing equipment, where the cost is greater than \$800.

Deductible

Boards will be responsible for the first 20 percent of the cost of special education equipment technicians or technologists (salary and benefits).

Ineligible expenses

The following expenses are not eligible for ISA 1 funding:

a) *Capital expenditures*

Building modifications, such as physical accessibility modifications or features that are built into new classrooms, such as sound systems or noise reducing surface

treatments (i.e. carpets, ceiling tiles) are not eligible. Elevators and stair climbers do not qualify as lifts and will not be approved for equipment claims, as they are not considered personal care aids or devices.

An exception to this policy is permitted for the installation of dividers to create privacy rooms and beams that are required to support lifting devices.

b) Curriculum materials.

Reading books on CD ROMs or on tape, subject specific software, Braille materials where already available, and the cost of transcribing textbooks into Braille are not eligible. These should be paid for out of a board's curriculum materials budget, as are other textbooks and audio-visual materials.

c) GST

Because ISA 1 provides reimbursement based on actual costs, the GST rebate the boards receive from the federal government is not an eligible expense, and must be deducted from claimed amounts. The ISA 1 claim form provides a column for reporting this amount.

Coordination with MOHLTC Assistive Devices Program

Boards are encouraged to make use of the cost-sharing arrangements permitted through the Ministry of Health and Long-Term Care's (MOHLTC) Assistive Devices Program. ADP provides partial funding to individuals for some equipment required for daily living. Where the equipment is portable, it can be used at both home and school.

An ISA claim may not be made for the portion of the equipment cost eligible for funding assistance under ADP. The ADP program will not fund equipment required for only school purposes. For further information about the ADP please contact the MOHLTC - ADP through the blue pages of your local telephone directory.

Where a family has purchased a piece of equipment with ADP funding, and it is not portable between home and school, the board may submit a claim for the duplicate piece of equipment used at school.

Portability / Transferring Equipment

Equipment purchased with ISA 1 funding may be transferred with a student from school to school or from board to board. Where feasible, equipment is expected to be transferred with a student. The student's sending board will not be reimbursed by the ministry, since the equipment was purchased on behalf of the student, based on their needs. The

receiving board will be responsible for any shipping or handling costs associated with the transfer of equipment.

Portability of Specialized Equipment

The following table provides a summary of the Ministry of Education's expectations of transfer situations where ISA 1 funded equipment is expected to move with the student it was purchased for.

To \ From	District School Board	District School Authority	Hospital School Authority
District School Board	Yes	Yes	Yes
District School Authority	Yes	Yes	Yes
Hospital School Authority	Yes	Yes	Yes
Section 20 Program	Yes	Yes	Yes
Provincial & Demonstration School	Loans may be arranged	Loans may be arranged	Loans may be arranged
Private School	No	No	No
Post Secondary Institutions, Employment Settings, Student's Home *	No	No	No

* Boards' policies on disposing of used equipment could allow it to be sold at a depreciated price. Boards should also have policies covering the loan of ISA 1 funded equipment for use in home instruction.

Claim Process

The claim cycle for ISA 1 runs from May 1 of one year, to April 30 of the following year. This allows boards to purchase equipment prior to the start of a school year, when a student's needs are known. For example, when students who were attending a provincial or demonstration school will be enrolling in a district school board for the coming school year, a transition strategy should address whether specialized equipment will be required.

This annual cycle also allows time for the processing of board claims by the ministry in time for inclusion of the final approved allocation amount in each board's financial statements.

Each year, boards are required to complete and submit an electronic summary claim form that shows the required information for each claim. The ministry provides these forms to boards through designated contacts in each District Office.

New for 2004-05

In previous years, the ministry has required that all claims over \$6000 must be pre-approved during the school year. This process will not continue, in order to reduce administrative efforts while still achieving the ministry's audit objectives through other means. Ministry District Office staff will review a sample of the claims in detail as part of the year end audit process, during May and June. Ministry staff will review the files related to the sampled claims to ensure the appropriate documentation (as described below) for each has been maintained, and that the claimed expenses are eligible for funding.

Ministry staff will also be requesting that classroom visits be arranged for a small proportion of the claims during the school year. It is expected that during on-site visits:

- the equipment would be found with the student for whom the cost was claimed;
- the equipment would be found in good repair; and,
- the student and/or staff would be able to operate the equipment.

During the school year, district office staff are available to provide direction and policy interpretation whenever questions arise as to the eligibility of specific items.

Required Documentation

Each ISA Level 1 claim must be documented by:

- a) an assessment or assessments on file from an appropriately qualified professional:

The appropriately qualified professional will vary depending upon the nature of the student's need and the purpose and function of the equipment. The assessment(s) must include a diagnosis of the condition the equipment is meant to address and a recommendation regarding the specific types of equipment the student requires to address their needs. In some cases, more than one type of professional will need to be consulted in order to provide a complete picture of the students' needs and recommended equipment.

- b) evidence of proof of purchase, such as a copy of any purchase orders and invoices; and,
- c) a current copy of the student's IEP or other documentation (e.g. safety plan, behaviour management plan) that provides evidence of the intended use of the equipment in the student's program. Note that students must have an IEP when equipment is required to support classroom instruction and educational assessment.

Qualified Professionals

Boards are not required to obtain additional assessments for the purposes of ISA 1 where existing assessments already document students' needs.

Boards will need to develop their own operating policies to address issues such as accepting privately obtained assessments, and will need to build local capacity in order to have access to appropriate professionals.

The following provides a list of the type of professionals that the ministry expects would be conducting relevant assessments to determine a student's needs and identify appropriate equipment supports. By definition, professionals are assumed to be members of relevant colleges.

For the purposes of ISA 1 claims, assessments could be conducted by a:

- psychologist or psychological associate
- physician
- social worker
- audiologist
- speech and language pathologist
- augmentative communication therapist
- optometrist
- occupational therapist
- physiotherapist
- orthopédagogue (Quebec registered)

New for 2004-05

Alternatively, in some cases, a recommendation from a Provincial or Demonstration School or by specialist teachers working for a school board where their qualifications and expertise are recognized by the Provincial Schools Branch of EDU would be acceptable. This provision for recognizing specialist teachers is designed for only those few teachers whose credentials and experience would qualify them to teach at a Provincial School.