

**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Scott Jones  
Deputy Superintendent of Operations

**DATE:** March 17-18

**ACTION:** Indirect Cost Pool External Review and Training Status Report

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**Background:**

The external review firm (MAXIMUS) presented its final review of the rate proposal to key USOE and USOR personnel on Monday, March 14. The review included an explanation of how the data was collected and what is included in the package for submission to the Department of Education, along with a discussion about the development of a uniform information request to be used from year to year.

**Board Strategic Plan:**

This item supports the following imperative(s) and strategies in the Board's Strategic Plan:

- System Values

**Anticipated Action:**

It is anticipated that the Finance Committee will forward the indirect cost pool rate proposal to the full Board with a positive recommendation for submission to the Department of Education prior to the May 2016 extension deadline.

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# Utah State Office of Education

## Final Rate Proposal Review & Training

### Monday, March 14 – Tuesday, March 15

*Monday, March 14:*

**9:00 AM - 10:00 AM** – Final Review of the Rate Proposal

- At this point in time there shouldn't be any edits. If anything, it would be minor. Once all parties agree on the proposal we will submit to DOE for their review.
- All interested parties are welcome to attend

**11:00 AM - 12:00 PM** – Explain how the data that was collected is included in the package submitted to DOE

- Specifically, why does MAXIMUS request the information and what is the is purpose
- Natalie Grange, Kristine Rasmussen, and Deborah Jacobson should attend

**1:30 PM - 3:30 PM** – Develop a uniform “Information Request” that can be used from year to year

- Establish repeatable reports, allocation basis, and ICP interview process
- Each report (Year End Expenditures, Salary/Wage & Fringe, Unused Leave, etc) should all tie into each other, if possible.
- Natalie Grange, Kristine Rasmussen, and Deborah Jacobson should attend

*Tuesday, March 15:*

**9:00 AM - 10:00 AM** – Go over any remaining data collection issues. Schedule preliminary time-frame for the FY 2015 USOE Indirect Rate Proposal