



Public Charter Schools Grant Program (CSP)  
**2018-2020 Implementation Only**  
**Request for Proposal (RFP)**

Applicant Technical Assistance Webinar  
August 6, 2018



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# INTRODUCTIONS

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# AGENDA

- Overview of Competition and Eligible Applicants
  - Notice of Intent-to-Apply
  - Deadline
  - Highlights of the RFP
    - Funding Authority
    - Narrative Components and Scoring Criteria
    - Method of Review
  - Budget Submission
  - Method of Answering FAQs
  - Proposal Submission & Condition for Acceptance
-

# Overview of Competition

- **Implementation-only Grant**
  - Performance/budget period no longer than 18 months, and is only guaranteed for 12 months.
    - Traditional implementation timeline will not be available
  - Sub-awards anticipated funding at approximately **\$550,000** subject to the availability of funds
- **Eligible Applicant(s):**
  - Opened a charter school in the 2016-17 school year and has not previously received a CSP Implementation project award
  - Opened a charter school in the 2017-18 school year and has not previously received a CSP Implementation project award
  - Is opening a charter school in the 2018-19 school year and has not previously received a CSP Implementation project award
- **RFP administered in one stage only competition process**
  - Proposal includes submission of eight (8) Narrative Components
  - *Instructions for Submitting a Proposal* outlined on page 17 of RFP

# Notice of Intent-to-Apply

- Submit via email by **August 17, 2018**
- Email: [charterschoolgrant@fldoe.org](mailto:charterschoolgrant@fldoe.org)
- Subject Header: *“Intent to Apply to 2018-20 Implementation Only RFP”*
  - Include full name of charter school applicant name and district application

# Deadline

- **Complete Proposals due September 14, 2018**
  - *This refers to the date of receipt in the Department's Office of Grants Management.*
- Late proposals will not be accepted
- Failure to meet deadline will result in disqualification
- **Signatures Required:**
  - District Superintendent and Charter Governing Board Chair
  - Must be original \*NO COPIES\*
  - Recommended to use [Blue Ink](#)
- **Hard Copy Application** - mailing address located page 16 in RFP



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## RFP Highlights

Applications must be completed in hard copy and mailed to the Office of Grants Management at the Florida Department of Education by September 14<sup>th</sup>.

**\* ELECTRONIC UPLOAD/SUBMISSION NOT ACCEPTED; MAIL-IN ONLY.**



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# Funding Authority

Federal Funds: CFDA #84.282A – Title V, Part B, Subpart 1 of the Elementary and Secondary Education Act of 1965, as amended by No Child Left Behind Act of 2001\*

*\*Funding from the Department's 2011-2016 CSP federal grant*

# Eight (8) Narrative Components

1. Project Abstract or Summary
2. Project Need
3. Program Design and Implementation:
  - a) Governance
  - b) Curriculum, Instruction, Assessment, and Accountability
  - c) Business, Finance, and Accounting
  - d) School Leadership and Management
  - e) Special Populations
4. Evaluation
5. Outreach and Recruitment Plan
6. Support for Strategic Plan
7. Budget
8. Preference Points (if eligible)

# Narrative Components cont.

- Each component has its own Criteria
- NOTE: maximum WORD count for each component

## Scoring Criteria

- Standard **scoring Criteria** based on a 100 point scale
  - maximum final score of 115 points (100 points from the average score plus an additional 15 from preference points)
  - minimum Average Score of 70 points required for an application to be considered eligible for Preference Points and/or funding
- Preference points funding priorities:
  - SCHOOL GRADES
  - SERVICE AREA

# Method of Review

- DOE program staff conducts initial condition for acceptance to ensure federal regulations and state requirements are met
- Peer-review process
  - Each proposal reviewed/scored by five separate reviewers
  - Calculation of average score derived by sorting the five reviewer scores, dropping the highest and lowest, and averaging the remaining three
- Average score less than 70 are **not eligible** for preference points and/or funding consideration
- Final scored proposals ranked in order from highest to lowest
- Funding will be allocated based on rank order



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# Budget Submission

- Funding Method and Fiscal Requirements
- CSP Budget Essentials
- Budget Development
  - Narrative Form (DOE-101S)
  - CSP 2-Year Budget Development Tool
- Budget Preparation and Allowable Cost Guide



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# Funding Method & Fiscal Requirements

- Budget Narrative Form, DOE-101S must be submitted as part of the Application.
  - CSP Program office requirement –completion of the *CSP 2-year Budget Development Tool* (\*see slide 18)
- Program funds must be used solely for activities that directly support the accomplishment of the program purpose, priorities and expected outcomes during the program period.
  - Initial implementation activities may include: (a) informing the community about the school; (b) acquiring necessary equipment and educational materials and supplies; (c) acquiring or developing curriculum materials; and (d) other initial operational costs that cannot be met from State or local sources.

# ACCOUNTABILITY THROUGH FEDERAL REGULATIONS\*

- **§ 200.302 FINANCIAL OVERSIGHT AND MANAGEMENT**
  - maintain records documenting compliance with Federal statutes, regulations, and the terms and conditions of the Federal award as part of an effective internal control system
- **§ 200.61, § 200.62, and § 200.303 INTERNAL CONTROLS**
  - reasonable assurance controls include: effective and efficient operations; (b) reliable reporting; and are (c) compliant with applicable laws and regulations.
- **§ 200.318 GENERAL PROCUREMENT STANDARDS**
  - use own documented procurement procedures
  - maintain oversight
  - maintain written standards
  - avoid unnecessary or duplicative items
  - award contracts only to responsible contractors
  - maintain records detailing the history of procurement
- **§ 200.313 Equipment and § 200.439 Equipment and other capital expenditures**
  - Use the equipment for the authorized purposes for which it was acquired
  - Property records must be maintained (physical inventory)

\*Programmatic Review of all new CSP applicants includes verification of school's incorporation of Federal Regulations through their REQUIRED DOCUMENTS (see [Review Standards for CSP Documents](#) handout).

# CSP Budget Essentials

- Sub-recipient schools may expend CSP funds only on goods and services used exclusively by the applicant charter school.
- All proposed budget line items must be reasonable, necessary, allowable and allocable.
- Budget requests must align with federal and state laws and guidance.
- Sub-recipient schools may be required to provide additional documentation and/or justification to the Program Office at any time.
- To ensure proposed budget costs meet review standards and are reasonable –quotes, price comparisons, or analysis to support requested budget items are required for thresholds: \$3,000 aggregated purchase cost and \$1,500 individual purchase cost.
- Regardless of threshold, ALL 600-series object code items (e.g. furniture, fixtures, equipment, computer hardware, etc.) must be accountable (labelled) and reported to the CSP program office via required Inventory Reports.
- All costs submitted to the fiscal agent (district) for CSP reimbursement must be listed in the final programmatically approved DOE-101S or DOE-151 budget. A copy will be included with the official DOE 200 Project Award Notification emailed by the program office. *Purchases made prior to submitting a budget amendment may not be eligible for reimbursement.*



# Budget Development

## Budget Narrative Form (DOE-101S)

- Department required form
- Budget Amounts are consolidated per Function and Object codes
- Account Titles should coincide the RED BOOK
- Narrative Descriptions provide general details to identify what goods or service(s) are needed
- Submits DOE-101S with RFP application

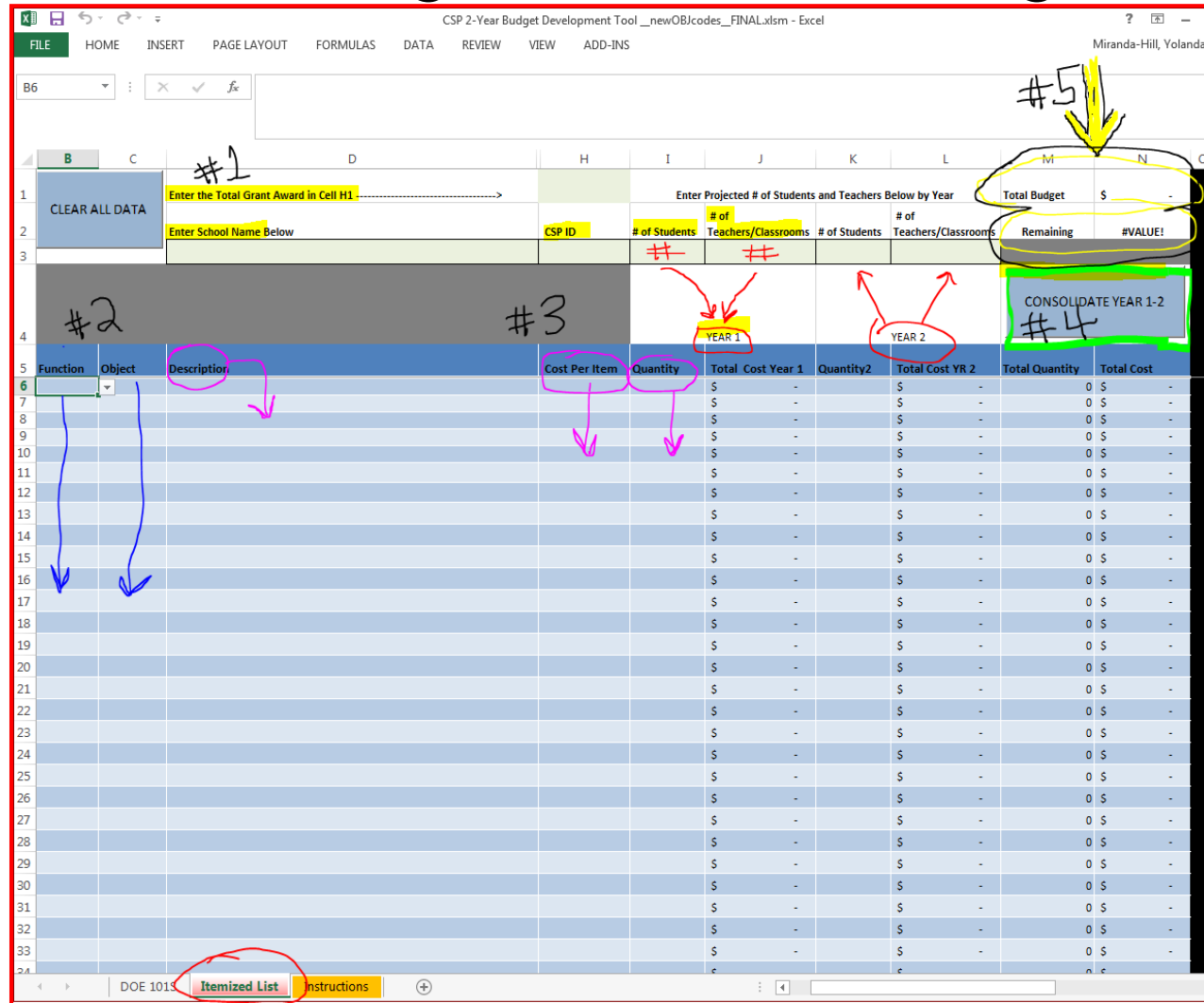
## CSP 2-Year Budget Worksheet

- Program Office formula-based worksheet
- Year-1 and Year-2 itemized list of budget needs
- Costs and Quantities per budget item is required
- Narrative Descriptions provide specific details to assess what is being requested and for what purpose
- Submits worksheet after receipt of email confirmation from the program office's initial review of CSP application

## Completing 2-Yr Budget:

# 2-Year Budget Tool for IMP Budgets

- Complete yellow highlighted data: school name, CSP-ID, num# of students/teachers/classrooms, grant total anticipated funding
- From Drop-down list, select appropriate Function and Object codes
- Enter Description, Cost Per Item, and Quantity for all proposed budget items
  - Note: quantities must reflect Year One and Year Two budget needs
  - Descriptions should provide specific details to assess what is being requested and for what purpose
- After ALL proposed items entered, click on **CONSOLIDATE Year 1-2** button
  - Worksheet will automatically combine Function and Object codes 'like' items and calculate grant totals for entire 2-Year budget
- 2-Year budget Tool tracks the Total Budget vs. Remaining funds
  - Schools can request remaining funds at later date in a budget amendment

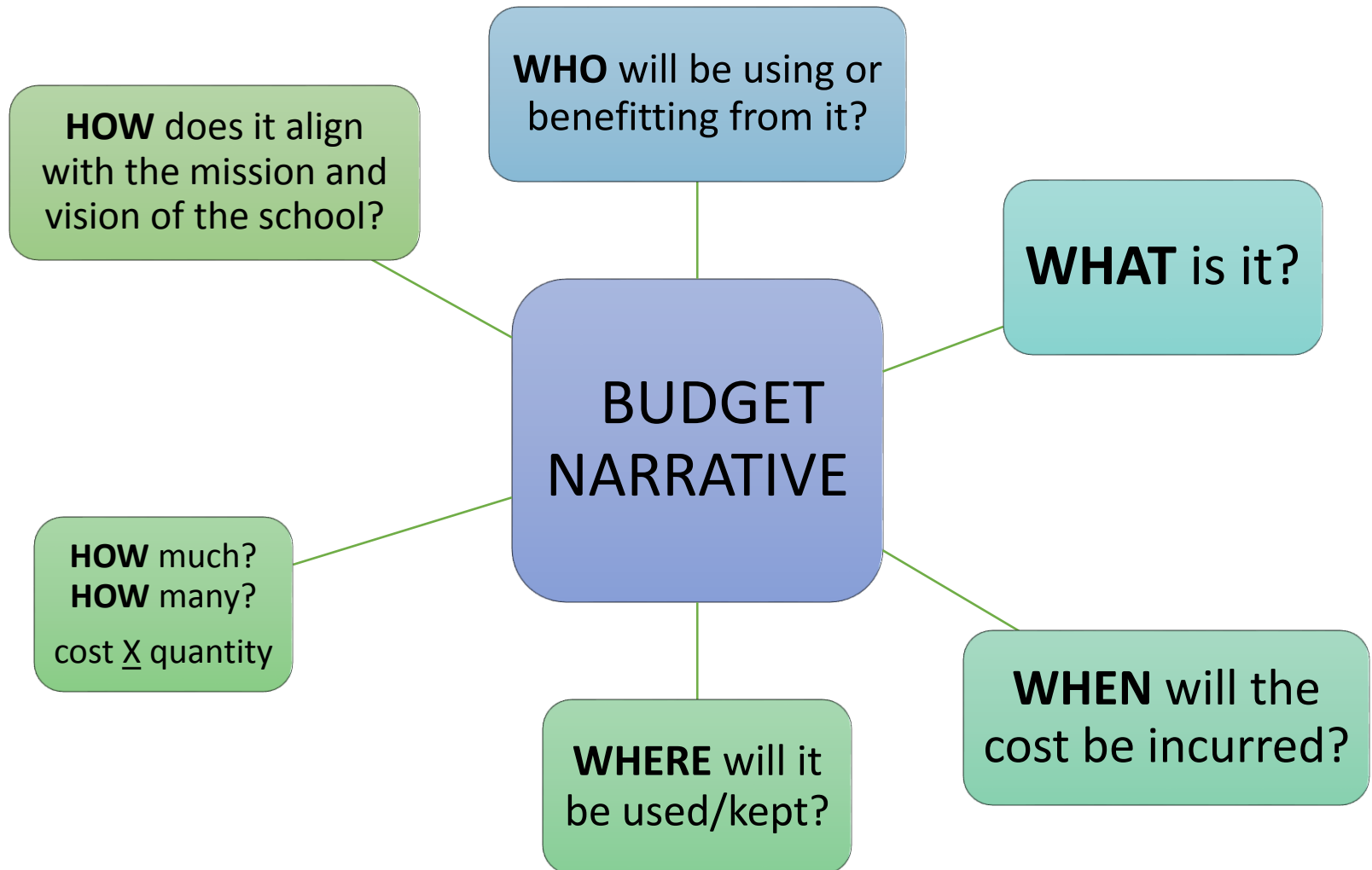


The screenshot shows an Excel spreadsheet titled "CSP 2-Year Budget Development Tool \_newOBJcodes\_FINAL.xlsm". The spreadsheet is divided into several sections:

- Header Section (Rows 1-3):** Contains input fields for "Enter the Total Grant Award in Cell H1" (with annotation #1), "Enter School Name Below", "CSP ID", "# of Students", "# of Teachers/Classrooms", "# of Students", and "# of Teachers/Classrooms".
- Summary Section (Rows 4-5):** Includes a "Total Budget" field (with annotation #5), a "Remaining" field, and a "CONSOLIDATE YEAR 1-2" button (with annotation #4).
- Data Entry Section (Rows 6-34):** A table with columns: Function, Object, Description, Cost Per Item, Quantity, Total Cost Year 1, Quantity2, Total Cost YR 2, Total Quantity, and Total Cost. Annotations #2 and #3 point to the Description and Cost Per Item/Quantity columns respectively.
- Footer Section (Row 35):** Contains a "DOE 101" button, an "Itemized List" button (circled in red), and an "Instructions" button.

Handwritten annotations include: #1 pointing to the grant award field, #2 and #3 pointing to the description and cost/quantity columns, #4 pointing to the consolidate button, and #5 pointing to the total budget field. A yellow arrow points from the total budget field to the remaining field.

# Budget Development - Asking the Right Questions



## NOTE: Issues with Cost Estimates



### ISSUE: Estimating without research

- No basis for cost estimate
- Basing estimate on purchase from previous year
- Basing estimate on purchase for another school



### CONSEQUENCE

- Program office cannot approve line item



### HOW to AVOID and/or CORRECT

- Complete price comparisons
- Request updated quotes/estimates from vendors

## NOTE: Clarification May Be Required



### ISSUE: Inadequate Clarification

- No supporting documentation
- Insufficient justification
- Information provided does not answer program office's question



### CONSEQUENCE

- Line item may not be approved
- Delay in the budget review/approval



### HOW to AVOID and/or CORRECT

- **Ask:** "Would request make sense to individual *outside* of the school?"
- **Ask:** "How does this help the school meet mission/vision?"
- **Ask:** "How does the budget item tie to the school's organized curriculum?"
- **Ask:** "Is the budget item a necessity or nicety?"



## CHARTER SCHOOL PROJECT (CSP) GRANT ALLOWABLE COSTS GUIDE

This handout is provided by the Program Office and is intended to assist CSP subgrantees with planning and preparing budgets and budget amendments for CSP funds.

### HOW TO USE THIS GUIDE:

- Allowable costs are organized into categories: Classroom Level, Instructional Support, and Operational Support.
- Some costs are **never** allowable with the CSP grant program. A list of unallowable costs is included in this guide.
- Whether a cost is allowable during the Planning or Implementation phase (either) is indicated in the Allowable Phase column as follows: **PLAN.**, **IMP.**, or **BOTH**.
- This reference guide is organized by Function and Object Codes. A comprehensive list of account titles is found in the Financial and Program Accounting Manual for Florida Schools (Red Book). Refer to the RED BOOK for the Function/Object Codes account titles (e.g. 5100/111 – Building – 1200 – Furniture, Fixtures and Equipment).
- **Please do not copy and paste** Descriptions from this guide. It is the responsibility of schools to determine whether a cost is allowable. To ensure sufficient detail is included when drafting a budget, please ensure to provide the WHO/WHAT/WHEN/WHERE/WHY information discussed as part of the 2016 CSP Grant Training titled Getting the Most Out of CSP Money from the CSP Program Office website.
- **Please do use** Approved Account Titles – this will assist the Program Office in reviewing the budget.
- Finally, if a cost or service is not listed in this document, contact your CSP grant specialist. They can help determine if a cost is allowable within the program and help with Account Titles and codes.

**TABLE 1: All proposed budget line items must be allowable and allocable.**

- Budget requests **must** align with the Program Office's views and guidance.
- Subrecipients may be required to provide additional documents to the Program Office at any time.
- Regardless of the funding source, all object code items (e.g. furniture, fixtures, equipment, computer hardware, etc.) must be accountable and reported to the program office through required Inventory Reports.
- All costs submitted to the fiscal agent (district) for CSP reimbursement must be included in the final programmatic approved DOE-1015 or DOE-151, which is included in the official DOE 200 Project Award Notification emailed by the program office. **Purchases made prior to the budget amendment may not be eligible for reimbursement.** Please see the Memorandum regarding Additional Guidance to CSP Budget Amendments and Expenditures (October 23, 2015) for details.

Under Review!  
Revised version to be posted by 8/10/18.



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## Method of Answering FAQs

- Questions pertaining to application process should be e-mailed to [charterschoolgrant@fldoe.org](mailto:charterschoolgrant@fldoe.org) with “CSP Question” in the subject header.
- Questions must be received by close of business on Thursday, August 9, 2018.



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## Proposal Submission & Condition for Acceptance

- See page 15-16 of RFP for details
  - List of required items for a complete proposal
  - Note: Items to be provided by the Department



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# Reminder

- Intent-to-Apply email notification must be sent to program office by **August 17, 2018**
- Complete Proposals are due **September 14, 2018**
- Budget Narrative Form, DOE-101S must be submitted as part of the Application
- Following **Instructions for Submitting a Proposal** page 17 of RFP



**Thank you for participating.**

Click to access:

[2018-2020 Implementation Only  
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