The Charter School Program
Grant Amendment Process

Office of Independent Education and Parental Choice

October 2021
Budget Amendments

May be submitted to:

• Reallocate approved funding.
• Request remaining grant funds.

Forms:

• DOE150, Project Amendment Request
• DOE151, Budget Amendment Narrative Form
**Budget Amendments**

- Form DOE 150, Project Amendment Request

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![Form DOE 150](Image)

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**FLORIDA DEPARTMENT OF EDUCATION**

**PROJECT AMENDMENT REQUEST**

**DOE USE ONLY**

**A) Agency Name:**

**Date Received:**

**B) Program Name:**

**Project Number (DOE Assigned):**

**C) Amendment Type:**

- Program
- Budget

**D) Amendment Request Contact Information**

- Contact Name:
- Telephone Numbers:
- Mailing Address:
- E-mail Addresses:

**E) Required Signature and Certification**

I, (Please Type Name) as the official who is authorized to legally bind the agency/organization, do hereby certify to the best of my knowledge and belief that all the information and attachments submitted in this application amendment are true, complete and accurate, for the purposes, and objectives, set forth in the RFA or RFP and are consistent with the statement of general assurances and specific programmatic assurances for this project. I am aware that any false, fictitious or fraudulent information or the omission of any material fact may subject me to criminal, or administrative penalties for the false statement, false claims or otherwise. Furthermore, all applicable statutes, regulations, and procedures; administrative and programmatic requirements; and procedures for fiscal control and maintenance of records will be implemented to ensure proper accountability for the expenditure of funds on this project. All records necessary to substantiate these requirements will be available for review by appropriate state and federal staff. I further certify that all expenditures will be obligated or spent after the effective date and prior to the termination date of the project. Disbursements will be reported only as appropriate to this project, and will not be used for matching funds on this or any special project, where prohibited.

Further, I understand that it is the responsibility of the agency head to obtain from its governing body the authorization for the submission of this modification amendment.

**Signature of Agency Head**

**Title**

**Date**

**Signature of Charter Head**

**Title**

**Date**

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**F) Narrative**

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**DOE 150**

**Revised July 2015**

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**Richard Corcoran, Commissioner**

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www.FLDOE.org
Budget Amendments

- Form DOE 151, Budget Amendment Narrative Form
Budget Amendment – Reallocation

- Reallocate funds for unused budget items.
- Identify any quantities already purchased (provide price per item, quantity, and total).
Budget Amendment – Increase Only

- Expending 90% of approved funds is required.
Tips for Developing a Proposed Budget Amendment

• Refer to the CSP Allowable Costs Guide.
• Describe each item – (who, what, when, where, how) but do not include name brands.
• Round to the nearest dollar for new line items.
• Avoid grouping items by vendor/quote.
• Request only items needed during the grant period.
• Submit price quotes or justification, if requested.
• Ensure alignment to current student enrollment and be reasonable, necessary and allowable.
Tips for Developing a Proposed Budget Amendment, continued

• Ensure all items needed are included in the budget proposal submitted to the DOE.

• Revising approvable budget line items after the initial programmatic review is completed (quantities, cost per item, etc.) delays the approval process.

• For reallocations, exclude line items with < $1.00 in remaining balances.

• Reallocations should focus on making important adjustments and not revising entire budgets.
Approval Process

Documents received in Grants Management (GM) → GM completes intake process → CSP program office intake → Grant Specialist Review

CSP Grant Director Approval → GM reviews & generates award letter → IEPC Executive Director

Award letter provided to school & district → Charter Schools Director

Award Letter Accuracy Review → Budget Analyst Review & input into grant tracking system

www.FLDOE.org
Awards Notification Letter (DOE200)

1. **Project Recipient:** Miami-Dade County School District

2. **Project Number:** DOE200

3. **Project/Program Title:** Public Charter School Program (CSP) Planning, Program Design, and Implementation

4. **Amendment Information:** Amendment Number: 2

5. **Amendment Budget:**
   - Current Approved Budget: $522,708.00
   - Federal Cash Advance: $537,708.00

6. **Project Period:** 04/03/2018 - 04/02/2020

7. **Budget Period:** 04/03/2018 - 04/02/2020

8. **Contractor:** V Büro Florida

9. **Terms and Special Conditions:**
   - The Department retains the right to restrict access to the grant funds under certain circumstances, including but not limited to:
     - Actual enrollment below 75% of projected enrollment,
     - Failure of a sub-recipient charter school to timely submit required reports, and inventory reports through FLCSR.org,
     - Purchases made outside of the approved budget, and/or
     - Corrective action required following a monitoring site visit.

10. **Approval:**
    - Approved: 9-11-19
    - Commissioner of Education

11. **Instructions:**
    - Federal Cash Advance: On-line Reporting required monthly to meet expenditure.
    - Advance Payment: Upon receipt of the Project Award Notification, up to 125% of the total award may be advanced for the
      first payment period. To receive subsequent payments, 90% of previous expenditures must be documented and
      approved by the Department.
    - Quarterly Advance to Public Entity: For quarterly advances of non-federal funding to state agencies and LEAs.
      The advance is in accordance with the quantity of funds Federal Appropriations Act. Expenditures must be documented
      and reported to DOE at the end of the project period. If needed, the recipient must have expenditure data documentation.
    - Expenditures: Federal Appropriations Act. Expenditures must be documented and reported to DOE at the end of the
      project period. If needed, the recipient must have expenditure data documentation.
    - Submission of Performance: Payment made upon submission of documented allowable expenditures, plus
      documentation of completion of specified performance objectives.
    - Timeline: Timeline requirements for financial and program reporting/requests are to be Department of Education.

12. **DOE Contract:** Program contract for program issues, Grants Management Unit for processing issues, and Comptroller's Office

13. **DOE Revised:** DOE209 Revised 07/15

14. **Page:** 1 of 2

15. **Website:** www.FLDOE.org
Using FLCSP for Amendment Requests
Expenditure Reporting on FLCSP

• Use the Show/Hide Expenditures feature to ensure accurate reallocation requests.

• Report approved quantities and unit costs – expenditure overages should not be included on reporting without program office approval.
Expenditure Reporting on FLCSP, continued

- Report expenditures no later than the 1\textsuperscript{st} day of each month.
- Avoid reporting $0.00
- Increases to \textbf{Quantities} or \textbf{Unit Costs} \textbf{require} approval from program office – amendments \textbf{cannot} be used to correct overages even if actual expenditures did not exceed the approved line item total.
Useful Links
Amendment Forms

https://www.fldoe.org/schools/school-choice/charter-schools/charter-school-program-grant/grant-forms.stml

CSP Grant Forms

- DOE 150 - Project Amendment Request (Word)
- DOE 151 - Budget Amendment Narrative Form (Excel)
- Itemized Expenditure Report Template (Excel)
- Site Visit Monitoring Rubric (PDF)
- CSP 2-year Budget Development Tool Instructions (PDF)
- CSP 2-year Budget Development Tool (Excel)
- CMO Questionnaire (PDF)
- CO Location Questionnaire (PDF)

Technical Assistance

- Memorandum: Additional Guidance to CSP Budget (PDF)
- 2014 Non-regulatory Guidance (PDF)
- Review Standards for CSP Documents (PDF) - Revised January 2020
Sharefile and Submitting Amendments

https://fldoe.sharefile.com/Authentication/Login

- For optimal performance, use Google Chrome.
- Only contacts identified by FDOE have access.
- For technical assistance, email the Office of Grants Management at OGM@fldoe.org
- All amendments must be submitted via ShareFile – emailed forms will not be accepted.
CSP Grant Team

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