

Charter Online Management and Performance System (COMPS)

State Entity (SE) Program

Annual Performance Report (APR) and School/Subgrant Collection Module User Guide

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Comps.ed.gov

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2 Introduction

2.1 Overview

This document provides a description of the executed tasks and associated screenshots that are used to describe the implementation and performance of CSP grantees as part of the Charter School Programs (CSP) Data Collection, Risk Assessment, and Monitoring contract (GS-10F-0288W) and the Charter Online Management and Performance System (COMPS).

The Charter School Programs (CSP) grant program serves the purpose of Section 5201 of the Elementary and Secondary Education Act of 1965 (ESEA), which seeks to expand the number of high-quality charter schools and increase national understanding of the charter school model. State Entities (SE)s are one of the key institutions and recipients of Federal CSP funds. Eligible SE grantees include state educational agencies, state charter school boards, a Governor of a State, and charter school support organizations.

As CSP grant recipients, SE grantees have to follow certain Federal and U.S. Department of Education (ED) laws and regulations, as well as adhere to the project objectives and measures the grantee outlined in their grant applications. The APR is required under EDGAR §§ 74.51, 75.118, 75.590, and 80.40. The annual report provides data on the status of the funded project that corresponds to the scope and objectives established in the approved application and any amendments. Under EDGAR § 75.118, the report must provide the most current performance and financial information. The CSP collected additional data on schools funded through their grants using the CSP Data Collection Form, which supplemented the annual performance data and was first approved by OMB on November 21, 2016 (OMB Control Number 1855-0016).

Each Spring and Fall, these grantees are required to submit information related to their subgrant awards and progress towards meeting their grant objectives through the APR and school/subgrant data collection. These current requirements are being adapted and converted into an online data and reporting system to help streamline the process and collection of information from grantees.

2.2 Purpose

The Charter Online Management and Performance System (**COMPS**) is a web-based application designed to assist ED in conducting compliance and performance monitoring activities for CSP grantees. COMPS accumulates evidence of compliance and performance from grantees, as well as provides the ability to capture previously reported data in a more secure and efficient manner. The vision is that COMPS will:

- Streamline the collection of data relating to the CSP monitoring of SEs using COMPS.
- Provide a comprehensive performance and knowledge management platform.

- Collect grant-recipient performance data, imports budget data, performs analytics, automates key document and reporting workflows, and enables two-way communication between OESE and grantees.

Grantees currently submit their Annual Performance Reports through the ED 524B generic form, and report on funding to schools using the Excel-based *CSP Data Collection Form*. The new collection for grantees will combine and refine the data elements from each, and provide for reporting via a web-based platform.

Two modules in COMPS are covered within this user guide. They are:

- School/Subgrant Data Collection Module (Section 3): Based on the current CSP Data Collection Form, this module allows ED to monitor CSP grant performance and analyze data related to accountability for academic performance and financial integrity. Grantees submit data twice per year (Spring and Fall) to update subgrant award information, obligations, operational statuses etc.
- Annual Performance Reports (APR) Module (Section 4): Based on the “paper form” that is submitted to ED today, this module allows grantees to submit their APRs twice per year (Spring and Fall) to enter narratives on their performance towards meeting project and grant objectives, pipeline, and budgets.

Authorized users submit their APRs using this system. In each subsequent reporting period, grantee users will only be required to update those sections of the performance report that have new activity or outcomes, thereby eliminating the need to re-enter the same static information each year. This is the most efficient way to collect and review performance reports at the grantee and program level. It also allows for rapid dissemination of data collected as it is collected via the web-based system and stored in a secure database. ED staff can access the data at any time to respond immediately to Congress. Select data elements are made available to authorized grantee users via the web-based application.

The purpose of this document is to outline the key tasks SE Grantees undergo to complete the required activities in COMPS for the Spring and Fall reporting cycles, using the School/Subgrant and APR modules.

3 School/Subgrant Data Collection

3.1 Overview

The School/Subgrant Data Collection module is an online version of the previously used, excel based CSP Data Collection form. This module is used to collect information to ensure compliance and gauge program impact. ED seeks to collect descriptive information about program operation from each grantee. Also, ED seeks to collect school-level information on the operational statuses of all CSP-funded schools; amounts obligated and paid to CSP-funded schools; CMO and Authorizer information; and other school-level data (Title I status, school type, enrollment, and grade levels served). This module will be utilized twice a year by all CSP grantees funded through the SE program. The module is considered part of the reporting requirement for grantees and, as such, is typically administered in conjunction with the Annual Performance Report (APR) and again six months following (usually as grantees are submitting updated budget documents to CSP).

3.2 Reporting Steps

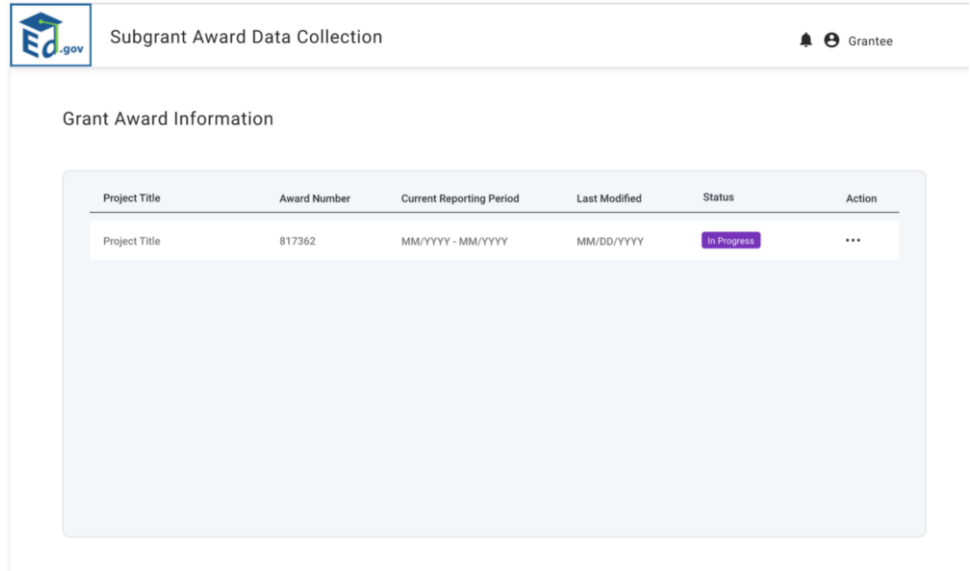
At a high-level, SE Grantees will interact with the system as follows:

1. Grantees will have filled out a Grant Profile for their associated CSP award (see Grant Profile User Guide).
2. Each reporting period (spring and then the fall), ED will open the system for reporting.
3. Grantees will enter the School/Subgrant Data Collection Module to submit data associated to their grant award.
4. Grantees will fill out the requirement information and add a subgrant (if new), or update subgrants (e.g., obligations made).
 - a. Please note: The subsequent sections/screenshots show the “add” school aspect of the process. Grantees can also click to edit prior subgrant submissions. This has the same data fields but would display what they had previously submitted.
5. Grantees will submit it back to ED/Contractor for review.
6. ED/Contractor will review, and either approve or reactivate the submission.
7. If reactivated, the grantees will add or correct information and resubmit the information back to ED.
8. Information submitted in the School/Subgrant Data Collection module will feed into the APR module (see section 4).
9. The process repeats each Spring and Fall until the grant award is closed out.

3.3 Tasks and Screenshots

3.3.1 Dashboard

1. Grantees will enter COMPS and click on the Subgrant Award Data Collection Module.
2. Grantees will see their associated awards.
3. Grantees will click the action button to be able to view/edit.



The screenshot displays the 'Subgrant Award Data Collection' dashboard. At the top left is the 'Ed.gov' logo. The page title is 'Subgrant Award Data Collection'. On the top right, there is a notification bell icon and the user name 'Grantee'. Below the header, the section is titled 'Grant Award Information'. A table lists the grant awards with the following columns: Project Title, Award Number, Current Reporting Period, Last Modified, Status, and Action. The table contains one row with the following data: Project Title, Award Number 817362, Current Reporting Period MM/YYYY - MM/YYYY, Last Modified MM/DD/YYYY, Status 'In Progress' (indicated by a purple button), and Action '...'.

Project Title	Award Number	Current Reporting Period	Last Modified	Status	Action
Project Title	817362	MM/YYYY - MM/YYYY	MM/DD/YYYY	In Progress	...

3.3.2 Subgrant Award Page

1. Grantees will enter the subgrant dashboard, which displays key information about their subgrants.
2. Grantees will click the “Add Subgrant” button to add subgrant award information.
3. Note: if this is a subsequent reporting period, the Grantee will previously added subgrants as rows under the School Award Information table and be able to click to update information tied to that subgrantee.

The screenshot displays the 'Subgrant Award Data Collection' dashboard. At the top left is the 'Ed.gov' logo, and at the top right is the user name 'Grantee'. The main section is titled 'Award Information' and includes an 'Add Subgrant' button. Below this, there is a summary box with the following data:

TOTAL SUBGRANT AWARD INFORMATION	Total Award Amount Obligated from ED	\$100,000.00	NUMBER OF SUBGRANTS 0
	Total Subgrant Funding Amount	\$20,000.00	
	Total Award Amount Remaining	\$80,000.00	

Below the summary box is a section titled 'School Award Information' with a message: 'No school entries. Click 'Add Subgrant' to enter school award information.'

3.3.3 Subgrant Award Data Collection – Contact Information

1. After clicking “add subgrant” or “edit” on a previously entered subgrant, Grantees will enter specific Charter School Information as listed to the right.
2. The required information includes: School Name, NCES ID, Subgrant Type, School address and the project period dates for the subgrant.
3. Note: There are dropdowns and auto fills to speed the entry of this information.
4. They will then click save and continue.

The screenshot displays the 'Subgrant Award Data Collection' interface. On the left is a dark blue sidebar with a white 'Ed.gov' logo at the top. The sidebar contains a list of menu items: 'Contact Information' (highlighted in white), 'Authorization & Managem...', 'Operational Information', 'Subgrant Award Information', and 'Additional Information'. The main content area is white and titled 'Subgrant Award Data Collection' at the top. In the top right corner of this area, there is a notification bell icon and the text 'Grantee'. Below the title, the section is labeled 'Contact Information' and 'Charter School Information'. The form contains the following fields: 'School Name' (text input), 'School Identifier (NCES ID)' (text input), 'Subgrant Type' (dropdown menu with options: Replication, Expansion, New School), 'School Address' (multiple text inputs for Address 1, Address 2, City, State (dropdown), and Zip Code), and 'Project Period' (two date pickers for 'Begin Date' and 'End Date', both with the format MM/DD/YYYY and a calendar icon).

3.3.4 Subgrant Award Data Collection – LEA Information

1. Next, Grantees will submit information regarding their Local Education Agency (LEA).
2. The required information includes: LEA Name, NCES ID, Address, and two questions as depicted to the right.
3. They will then click save and continue.

The screenshot shows a web application interface for 'Contact Information'. On the left is a dark blue sidebar with a menu containing: 'Contact Information' (highlighted), 'Authorization & Managem...', 'Operational Information', 'Subgrant Award Information', and 'Additional Information'. The main content area is titled 'Contact Information' and contains a section for 'LEA Information'. This section includes several input fields: 'LEA Name', 'LEA NCES ID', 'Address 1', 'Address 2', 'City', 'State' (a dropdown menu), and 'Zip Code'. Below the address fields are two questions with radio button options: 'Does the charter school act as its own LEA?' (with 'Yes' and 'No' options, 'No' is selected) and 'Is it an LEA with only charter schools?' (with 'Yes' and 'No' options, 'No' is selected).

3.3.5 Subgrant Award Data Collection – Authorization and Management Information

1. Next, Grantees will submit information pertaining to the Authorization and Management of the Subgrantee.
2. The required information includes: Authorizer Type, Authorizer Name, Religious Affiliation, Date, and Authorizer Address.
3. They will then click save and continue.

The screenshot displays the 'Subgrant Award Data Collection' web application interface. On the left is a dark blue navigation sidebar with the following menu items: 'Contact Information', 'Authorization & Management...' (highlighted), 'Operational Information', 'Subgrant Award Information', and 'Additional Information'. The top header includes the 'Ed.gov' logo, the title 'Subgrant Award Data Collection', and a user profile icon labeled 'Grantee'. The main content area is titled 'Authorization and Management Information' and contains a section for 'Charter School Authorizer Information'. This section includes a dropdown menu for 'Authorizer Type' with options: 'Local Education Agency (LEA)', 'State Education Agency (SEA)', 'Non-Profit Organization (NPO)', 'Higher Education Institute (HEI)', 'Independent Chartering Board', 'Mayor/Municipal Office', and 'No'. Below this is a text input field for 'Authorizer Name'. A question 'Does the Authorizer have a religious affiliation?' is followed by radio buttons for 'Yes' and 'No'. The 'Date Authorized or Renewed' field is a date picker showing 'MM/DD/YYYY'. The 'Authorizer Address' section contains four input fields: 'Address 1', 'Address 2', 'City', and 'Zip Code', along with a 'State' dropdown menu.

3.3.6 Subgrant Award Data Collection – Authorization and Management Information

1. Grantees will fill out information regarding the Charter School Management.
2. If Grantees select No, they will move to the next section.
3. If Grantees select Yes, as displayed in the screenshots below, they will fill out information pertaining to the management organization such as management organization type, address and its roles/responsibilities.
4. Grantees can add multiple management organizations as needed.

The image displays two screenshots of the 'Subgrant Award Data Collection' web application. The top screenshot shows the 'Charter School: Authorization and Management Information' section. The question 'Is the school affiliated with a management organization?' is displayed with two radio button options: 'Yes' and 'No'. The 'No' option is selected. Below the question, there are 'Back' and 'Continue' buttons. The bottom screenshot shows the same section, but the 'Yes' option is selected. Below the question, there is a dropdown menu titled 'Management Organization Type' with three options: 'Non-profit Charter Management Organization (CMO)', 'For-profit Education Management Organization (EMO)', and 'Other'.

Management Organization Address

Address 1

Address 2

City State

Zip Code

Describe Roles and Responsibilities

Add New Management Organization

3.3.7 Subgrant Award Data Collection – Operational Info

1. Grantees will then fill out the specific School Characteristics.
2. This includes operational status, and the year students were enrolled.
3. Grantees will fill in the schools' virtual status (Full Virtual, Primarily Virtual, Supplemental Virtual, Not Virtual); the Title I Status, and School Type (Alternative, Technical, Traditional, and Special Education).
4. Grantees will also fill in three questions, displayed at the bottom of the screenshot.

The screenshot shows the 'Subgrant Award Data Collection' interface. On the left is a navigation menu with options: Contact Information, Authorization & Managem..., Operational Information (highlighted), Subgrant Award Information, and Additional Information. The main content area is titled 'Operational Information' and 'Charter School Characteristics'. A dropdown menu for 'School Operational Status' is open, displaying the following options: Open, Future, Closed, and Will Not Open.

If Future is selected, grantees fill in a date and explanation.

This screenshot shows the 'Operational Information' section with 'Future' selected in the 'School Operational Status' dropdown. Below this, there are several input fields:

- 'Anticipated Opening Date': A date picker field showing 'YYYY-MM'.
- 'If Delayed, Closed, or Non-Start, provide a rationale or explanation': A large text area for providing a rationale.
- 'Year school first enrolled students': Another date picker field showing 'YYYY-MM'.
- 'Virtual Status': A dropdown menu with options: Fully Virtual, Primarily Virtual, Supplemental Virtual, and Not Virtual.
- 'Title I Status': A dropdown menu with options: Schoolwide Program, Targeted Assistance School, and Not Title I.
- 'School Type': A dropdown menu with options: Alternative, Technical, Traditional, and Special Education.

Is this school a full-service community school (FSCS)?

Yes

No

Is this school a magnet school?

Yes

No

Has the charter school ever received funding support through the CSP's Credit Enhancement (CE) program?

Yes

No

< Back Continue >

3.3.8 Subgrant Award Data Collection – Lottery and Enrollment

1. Grantees will then fill out the Operational Information related to Lottery and Enrollment Information.
2. This includes specific questions as displayed in the screenshot as well as grades funded, offered, planned/total enrollment and waitlist.

The screenshot shows the 'Ed.gov' logo and the title 'Subgrant Award Data Collection' at the top. A navigation menu on the left lists: Contact Information, Authorization & Managem..., Operational Information (highlighted), Subgrant Award Information, and Additional Information. The main content area is titled 'Operational Information' and 'Lottery, Enrollment, and Demographics Information'. It contains the following fields:

- Does the charter school use a weighted lottery?
 Yes
 No
- Does the charter school participate in a unified school placement lottery?
 Yes
 No
- Grades Funded for Expansion
- Grades Offered
- Planned Enrollment
- Total Enrollment
- Waitlist

At the bottom, there are '< Back' and 'Continue' buttons.

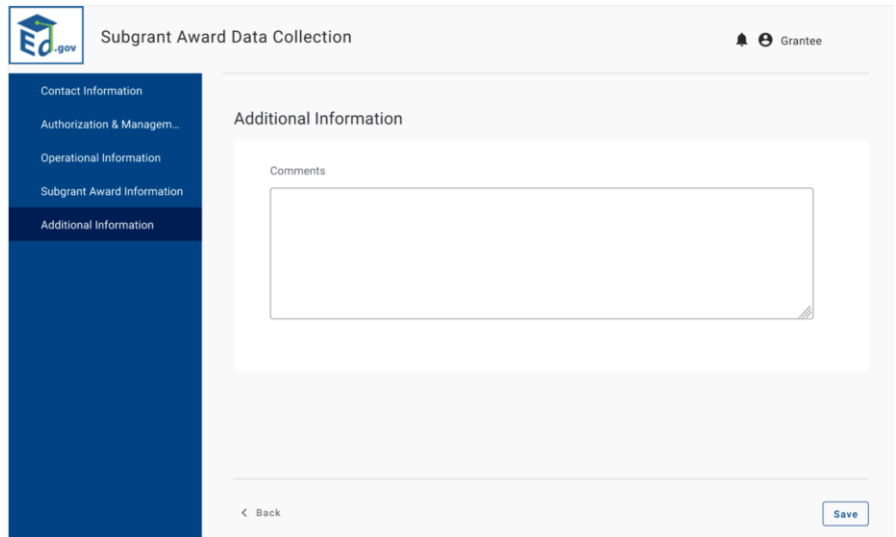
3.3.9 Subgrant Award Data Collection – Individual Obligations

1. Grantees fill out individual subgrant obligations, including the budget period for the subgrant, dollar amount obligated, date funds were obligated, and dollar amount paid to the school.
2. Grantees will update the subgrant obligations each reporting period (Spring and Fall) for each subgrant they have.

The screenshot displays a web application interface for 'Subgrant Award Information'. On the left is a dark blue sidebar with white text for navigation: 'Contact Information', 'Authorization & Managem...', 'Operational Information', 'Subgrant Award Information' (highlighted), and 'Additional Information'. The main content area is light gray and titled 'Subgrant Award Information'. Below the title is the section 'Individual Subgrant Obligations (Transaction) Periods'. This section contains four data entry fields: 1. 'Budget Period' with 'Begin Date' and 'End Date' fields, each containing a date format 'MM/DD/YYYY' and a calendar icon. 2. 'Dollar amount Obligated to School' with a text input field starting with a '\$' symbol. 3. 'Date Funds Were Obligated' with a date input field containing 'MM/DD/YYYY' and a calendar icon. 4. 'Dollar amount Paid to School' with a text input field starting with a '\$' symbol.

3.3.10 Subgrant Award Data Collection – Additional Information

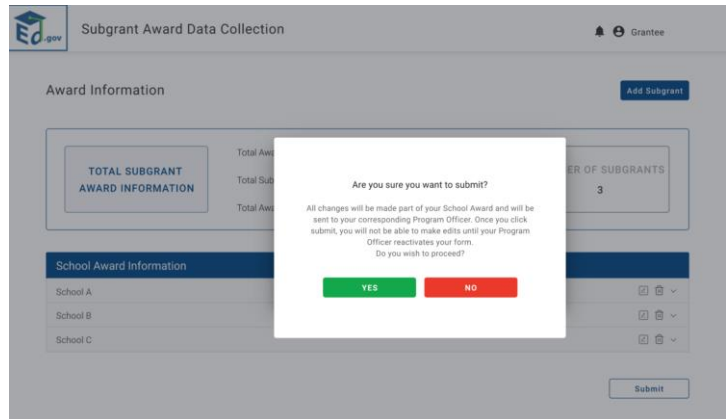
1. Finally, grantees can enter any additional information related to the reporting period that might be important for ED to consider.



The screenshot displays the 'Subgrant Award Data Collection' interface. At the top left is the 'Ed.gov' logo. The page title is 'Subgrant Award Data Collection'. In the top right corner, there is a notification bell icon and the text 'Grantee'. A vertical navigation menu on the left side contains the following items: 'Contact Information', 'Authorization & Managem...', 'Operational Information', 'Subgrant Award Information', and 'Additional Information', which is currently selected and highlighted in a darker blue. The main content area is titled 'Additional Information' and features a large, empty text box labeled 'Comments'. At the bottom left of the interface is a '< Back' button, and at the bottom right is a 'Save' button.

3.3.11 Review, Submit

1. Once Grantees have added their subgrant records and/or completed all data for the School/Subgrant Data module, they can submit the data collection information to ED.
2. As mentioned above, ED will review and accept the information, or ask the grantee to correct/resubmit information.
3. Once the Grantee submits the subgrant form, they will move on to submitting their APR.



4 Annual Performance Report (APR)

4.1 Overview

Grantees currently submit their Annual Performance Reports through the ED 524B generic form, and report on funding to schools using the Excel-based CSP Data Collection Form. The new collection for grantees will combine and refine the data elements from each, and provide for reporting via a web-based platform. State entity grantees will complete the following sections:

- Executive Summary
- Performance Measures Reporting
- Priorities and Requirements
- Pipeline
- Subgrant Application and Peer Review
- Lottery
- Subgrantee Monitoring
- Technical Assistance
- Budget Details
- Budget Implications

4.2 Reporting Steps

At a high-level, SE Grantees will interact with the system as follows:

1. Once their School/Subgrant data have been submitted within a reporting period (Spring/Fall), Grantees will then be able to access the APR module.
2. Grantees will fill out the required information in the APR.
 - a. Note: After the first APR submission, data is saved and then redisplayed to Grantees.
3. Grantees will submit it back to ED for review.
4. ED will review, and either approve or reactivate.
5. If reactivated, Grantees will add or correct information and resubmit.

4.3 Tasks and Screenshots

4.3.1 Dashboard

1. Once Grantees have submitted their School/Subgrant data, they will click on the APR module and enter the APR dashboard.
2. The dashboard will display their active grant awards and an active APR record.
3. Grantees will click Edit on the action menu on the associated grant award row.

Award Number	Reporting Period	Last Modified	Due Date	Status	Action
817362	MM/YYYY - MM/YYYY	MM/DD/YYYY	MM/DD/YYYY	Draft Submitted	...
817362	MM/YYYY - MM/YYYY	MM/DD/YYYY	MM/DD/YYYY	New	...
817362	MM/YYYY - MM/YYYY	MM/DD/YYYY	MM/DD/YYYY	In Progress	...
817362	MM/YYYY - MM/YYYY	MM/DD/YYYY	MM/DD/YYYY	Draft Submitted	...
817362	MM/YYYY - MM/YYYY	MM/DD/YYYY	MM/DD/YYYY	Draft Submitted	...
817362	MM/YYYY - MM/YYYY	MM/DD/YYYY	MM/DD/YYYY	Approved	...
817362	MM/YYYY - MM/YYYY	MM/DD/YYYY	MM/DD/YYYY	Required for Revisions	...

4.3.2 Intro

Grantees will first see an introduction and instruction page.

Explanation: Grantees under the Expanding Opportunity Through Quality Charter Schools Program (CSP) are expected to report on grant project status, including but not limited to topics related to project implementation and achievement of grant objectives, on at least an annual basis. The CSP Office uses APR data to inform continuation award decisions, to determine project effectiveness, as well as to report on the general health of the CSP.

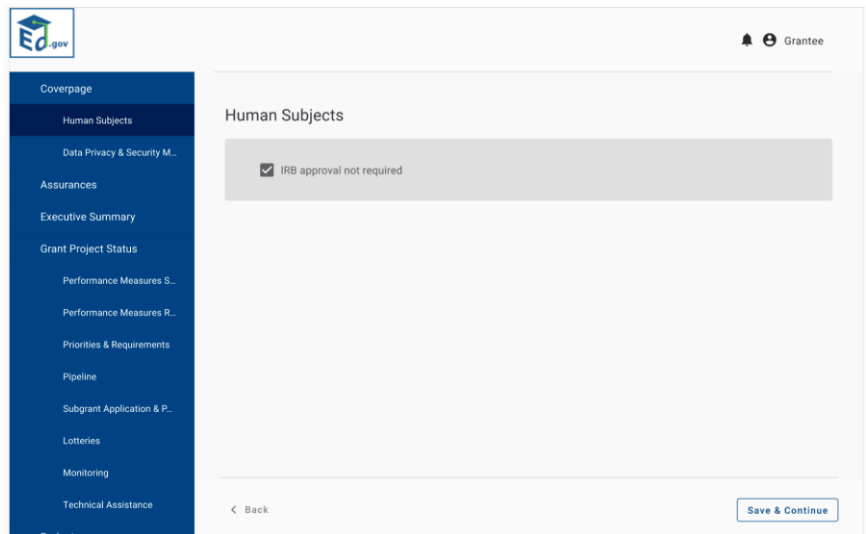
System Introduction

Instructions: Before you begin, please read the Dear Colleague Letter and Charter Schools Program Guide to Annual Performance Reporting (APR Guide). To access these documents and to find the COMPS User Guide, which has information about using the system's features, click on the icon in the Resources box below.

< Back Save & Continue

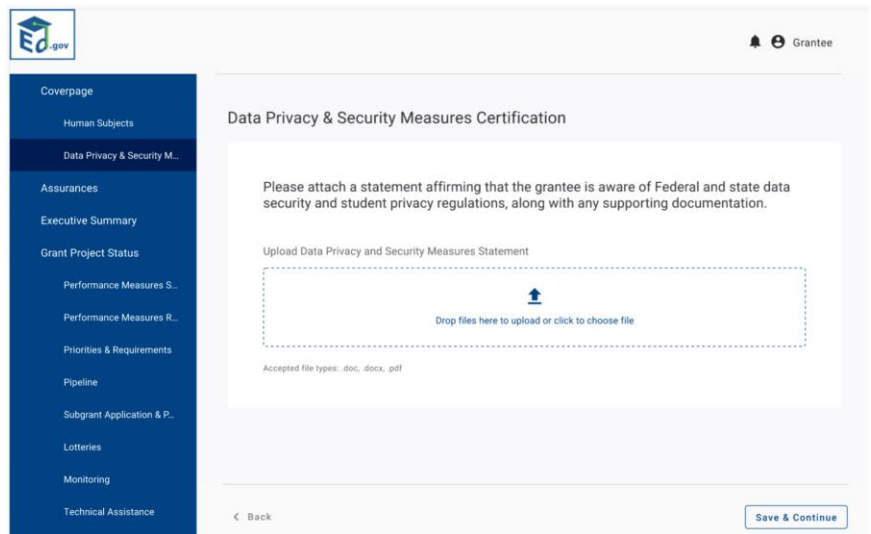
4.3.3 Human Subjects Entry

1. First, Grantees will review the Human Subjects entry from the Grant Profile.



4.3.4 Data Security and Privacy Measures

1. Next, they will be prompted to attach their latest Data Privacy and Security Measures Statement, which will be in the form of a PDF or Word document.



The screenshot shows the Ed.gov interface for the 'Data Privacy & Security Measures Certification' step. On the left is a dark blue navigation sidebar with the following menu items: Coverage, Human Subjects, Data Privacy & Security M... (highlighted), Assurances, Executive Summary, Grant Project Status, Performance Measures S..., Performance Measures R..., Priorities & Requirements, Pipeline, Subgrant Application & P..., Lotteries, Monitoring, and Technical Assistance. The main content area has a header 'Data Privacy & Security Measures Certification' and a sub-header 'Data Privacy & Security Measures Certification'. Below this, there is a text prompt: 'Please attach a statement affirming that the grantee is aware of Federal and state data security and student privacy regulations, along with any supporting documentation.' This is followed by the instruction 'Upload Data Privacy and Security Measures Statement' and a dashed-line drop zone containing an upload icon and the text 'Drop files here to upload or click to choose file'. Below the drop zone, it states 'Accepted file types: .doc, .docx, .pdf'. At the bottom left of the main area is a '< Back' link, and at the bottom right is a 'Save & Continue' button. The top right corner of the page shows a notification bell icon and the word 'Grantee'.

4.3.5 Assurances

1. Grantees will then enter the Assurances section and certify each statement by clicking on the checkboxes.
2. The assurances are entered in the Grant Profile and are pulled into this section.
3. This content show to the right is illustrative and depends on the cohort (fiscal year and program).

The screenshot shows the Ed.gov interface for the 'Assurances' section. On the left is a dark blue navigation sidebar with the following menu items: Coverpage, Human Subjects, Data Privacy & Security M..., Assurances (highlighted), Executive Summary, Grant Project Status, Performance Measures S..., Performance Measures R..., Priorities & Requirements, Pipeline, Subgrant Application & P..., Lotteries, Monitoring, Technical Assistance, Budget, Indirect Costs, Budget Details, Implications, Review, and Signature. The main content area is titled 'Assurances' and contains a text block: 'Recipients of funds under the CSP State Entity Grants program must provide the assurances described below. These assurances are from sections 4303(f)(2) and 4305(b)(3)(C) of the ESEA and the 2022 NFP. The source of each assurance is provided in parentheses following each assurance. As the duly authorized representative of the grantee, I certify to the following:'. Below this text is a list of seven assurance statements, each preceded by a checked checkbox. The statements are: 1. Each charter school receiving funds through this program will have a high degree of autonomy over budget and operations, including autonomy over personnel decisions (4303(f)); 2. The State entity will support charter schools in meeting the educational needs of their students, including children with disabilities and English learners (4303(f)); 3. The State entity will ensure that the authorized public chartering agency of any charter school that receives funds under the State entity's program adequately monitors each charter school under the authority of such agency in recruiting, enrolling, retaining, and meeting the needs of all students, including children with disabilities and English learners (4303(f)); 4. The State entity will provide adequate technical assistance to eligible applicants to meet the objectives described in application requirement (a)(1)(8) of section 4303(f); 5. The State entity will promote quality authorizing, consistent with State law, such as through providing technical assistance to support each authorized public chartering agency in the State to improve such agency's ability to monitor the charter schools authorized by the agency, including by- (a) Assessing annual performance data of the schools, including, as appropriate, graduation rates, student academic growth, and rates of student attrition; (b) Reviewing the schools' independent, annual audits of financial statements prepared in accordance with generally accepted accounting principles and ensuring that any such audits are publicly reported and; (c) Holding charter schools accountable to the academic, financial, and operational quality controls agreed to between the charter school and the authorized public chartering agency involved, such as renewal, non-renewal, or revocation of the school's charter (4303(f)); 6. The State entity will work to ensure that charter schools are included with the traditional public schools in decision-making about the public school system in the State (4303(f)). At the bottom of the page, there is a '< Back' button on the left and a 'Save & Continue' button on the right. The top right corner of the page shows a notification bell icon and the text 'Grantee'.

4.3.6 Executive Summary

1. Grantees will then upload an Executive Summary to provide an overview of the grant project implementation.
2. The Grantee will adhere to the instructions listed in the screenshot to the right.

The screenshot shows the Ed.gov interface for the Executive Summary section. On the left is a dark blue navigation sidebar with the following menu items: Coverpage, Human Subjects, Data Privacy & Security M..., Assurances, Executive Summary (highlighted), Grant Project Status, Performance Measures S..., Performance Measures R..., Priorities & Requirements, Pipeline, Subgrant Application & P..., Lotteries, Monitoring, Budget, Indirect Costs, Budget Details, Implications, Review, and Signature. The main content area has a white background and includes a notification bell icon and the text 'Grantee' in the top right corner. Below the navigation bar, there is an 'Explanation' section: 'Explanation: Grantees complete an Executive Summary with each APR and Ad-Hoc submission. Grantees will draft their responses to the Executive Summary questions in a document outside of COMPS and upload the document as a .doc, .docx, or PDF to the system with each submission. This narrative helps the program office by providing a summary of the project implementation. While the questions have slightly changed, grantees already provide this information in their APRs.' This is followed by a paragraph: 'Grantees should provide a status of grant project implementation in the Executive Summary. Please draft a brief response to each of the prompts below. The Executive Summary should be between 1-2 pages total.' Below this is a numbered list of two main prompts with sub-prompt letters (a, b, c, d). Prompt 1 asks for a summary of the overall project and its components. Prompt 2 asks for factors that have led to changes in the project or local context. A note below the list states: 'Note: Submission of proposed changes via the APR does not equate to approval of the changes by the CSP Office.' At the bottom of the main content area, there is an upload section: 'Upload the grantee's summary here, answering the questions above'. Below this is the text 'Upload file below:' and a dashed blue box containing an upward-pointing arrow icon and the text 'Drop files here to upload or click to choose file'. Below the box, it says 'Accepted file types: .doc, .docx, .pdf'. At the very bottom of the interface, there are two buttons: '< Back' on the left and 'Save & Continue' on the right.

Ed.gov

Grantee

Coverpage

Human Subjects

Data Privacy & Security M...

Assurances

Executive Summary

Grant Project Status

Performance Measures S...

Performance Measures R...

Priorities & Requirements

Pipeline

Subgrant Application & P...

Lotteries

Monitoring

Budget

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Budget Details

Implications

Review

Signature

Explanation: Grantees complete an Executive Summary with each APR and Ad-Hoc submission. Grantees will draft their responses to the Executive Summary questions in a document outside of COMPS and upload the document as a .doc, .docx, or PDF to the system with each submission. This narrative helps the program office by providing a summary of the project implementation. While the questions have slightly changed, grantees already provide this information in their APRs.

Grantees should provide a status of grant project implementation in the Executive Summary. Please draft a brief response to each of the prompts below. The Executive Summary should be between 1-2 pages total.

1. Provide a summary of the overall project, including a brief description of key components and objectives described in the application.
 - a. Describe activities related to the State entity grantee's subgrant application process, peer review process, provision of technical assistance, subgrantee monitoring process, grant management, and other grant-funded activities.
 - b. Describe the status of the State entity grantee's charter school pipeline and the State entity grantee's ability to meet approved pipeline projections.
 - c. If the State Entity grantee has amended its original approved application since the grant was awarded or since submission of the last APR (as appropriate), describe the changes, the progress, and the impact on the grant.
 - c. Describe any successes and challenges in the project planning and implementation, to date.
 - d. Describe the status of any key partnerships (new or existing), including all partnerships described in the original approved application.
2. Provide factors that have led to changes in the overall project and/or local context changes that have impacted or may impact the State entity grantee's ability to carry out the project effectively.
 - a. Describe any changes at the state or local level, including legislative or regulatory changes or authorizer policies, that have impacted the implementation of the project, either positively or negatively.
 - b. Describe any changes to key personnel since the grant award or last APR (as appropriate). Provide a resume for new staff (if not previously submitted to the Program Officer).
 - c. Describe any anticipated or proposed changes to the project in the current budget period.

Note: Submission of proposed changes via the APR does not equate to approval of the changes by the CSP Office.

Upload the grantee's summary here, answering the questions above

Upload file below:

Drop files here to upload or click to choose file

Accepted file types: .doc, .docx, .pdf

< Back

Save & Continue

4.3.7 Grant Project Status – Performance Measures Status

1. Grantees will then indicate if they have complete data on performance measures. If not, they have to indicate the date when the data will be available and the reason for the delay.

The screenshot shows a web interface for a grantee to report performance measures status. On the left is a dark blue navigation menu with the following items: Coverpage, Human Subjects, Data Privacy & Security M..., Assurances, Executive Summary, Grant Project Status, Performance Measures S..., Performance Measures R..., Priorities & Requirements, Pipeline, Subgrant Application & P..., Lotteries, Monitoring, Technical Assistance, Budget, Indirect Costs, Budget Details, and Implications. The 'Performance Measures S...' item is currently selected. The main content area is titled 'Performance Measures Status' and contains the following questions and input fields:

- Question: "Does the State Entity grantee have complete data on performance measures for the current reporting period (period inserted here)?"
Options: Yes, No
- Question: "Does the State Entity grantee have complete data on performance measures for the current reporting period (MM/YYYY)?"
Options: Yes, No
- Text input field: "If no, please explain data delays"
- Text input field: "When will the data be available and submitted to the Department?"
Label: Submission Date
Format: MM/DD/YYYY

At the bottom of the form, there are two buttons: "< Back" and "Save & Continue".

4.3.8 Grant Project Status – Performance Measures Reporting

1. Grantees will then review their project and performance measures that were submitted within the Grant profile.
2. If they have the data, Grantees will indicate the status of progress (met, not met, in progress), the actual numbers, and provide additional details.
3. Grantees will provide this information for each performance measure under a grant objective.
4. They will click save and then continue to the next page.

The image displays two screenshots of the Ed.gov Performance Measures Reporting interface. Both screenshots feature a dark blue sidebar on the left with a white 'Ed.gov' logo at the top. The sidebar contains a list of menu items: Coverpage, Human Subjects, Data Privacy & Security M..., Assurances, Executive Summary, Grant Project Status, Performance Measures S..., Performance Measures R..., Priorities & Requirements, Pipeline, Subgrant Application & P..., Lotteries, Monitoring, and Technical Assistance. The top screenshot shows the 'Performance Measures Reporting' title page. It includes an 'Ed.gov' logo, a notification bell, and the user name 'Grantee'. The main content area has the title 'Performance Measures Reporting' followed by an explanation: 'Explanation: Grantees have approved project-level objectives and performance measures prepopulated in the COMPS APR from the Grant Profile. When grantees enter the Performance Measures Reporting section in the APR module, they see a list of their project objectives and associated performance measures they entered into their Grant Profiles. In each APR and Ad-Hoc submission, grantees update the status of progress and associated data for each of their performance measures. These data help the program office track the project's progress in meeting grantees' approved performance measures.' Below this is an 'Instructions' section: 'Instructions: Provide data for each performance measure and describe findings or outcomes to demonstrate that the State entity grantee has met or is making progress toward meeting the performance measure, and explain how such performance measure data demonstrate that the grantee has met or is making progress toward meeting the project objective.' At the bottom of the page are '< Back' and 'Save & Continue' buttons. The bottom screenshot shows the data entry form. It has the same sidebar and header. The main content area is titled 'Performance Measures Reporting' and shows two project objectives. 'Project Objective 1: Lorem ipsum sit met' has two performance measures: 'Project Performance Measure 1A: Lorem ipsum sit met' and 'Project Performance Measure 1B: Lorem ipsum sit met', each with a dropdown arrow. 'Project Objective 2: Lorem ipsum sit met' has one performance measure: 'Project Performance Measure 2A: Lorem ipsum sit met' with a dropdown arrow. At the bottom are '< Back' and 'Save & Continue' buttons.

Grant Project Status

- Performance Measures S...
- Performance Measures R...**
- Priorities & Requirements
- Pipeline
- Subgrant Application & P...
- Lotteries
- Monitoring
- Technical Assistance
- Budget
 - Indirect Costs
 - Budget Details
 - Implications
- Review
- Signature

Project Performance Measure 1B: Lorem ipsum sit met

Status of Progress

Met

Not Met

In Progress (only applicable to measures with completion dates that fall after the end of the reporting period. In Progress measures must be updated in the Ad Hoc Report.)

Target

Imported from grant profile

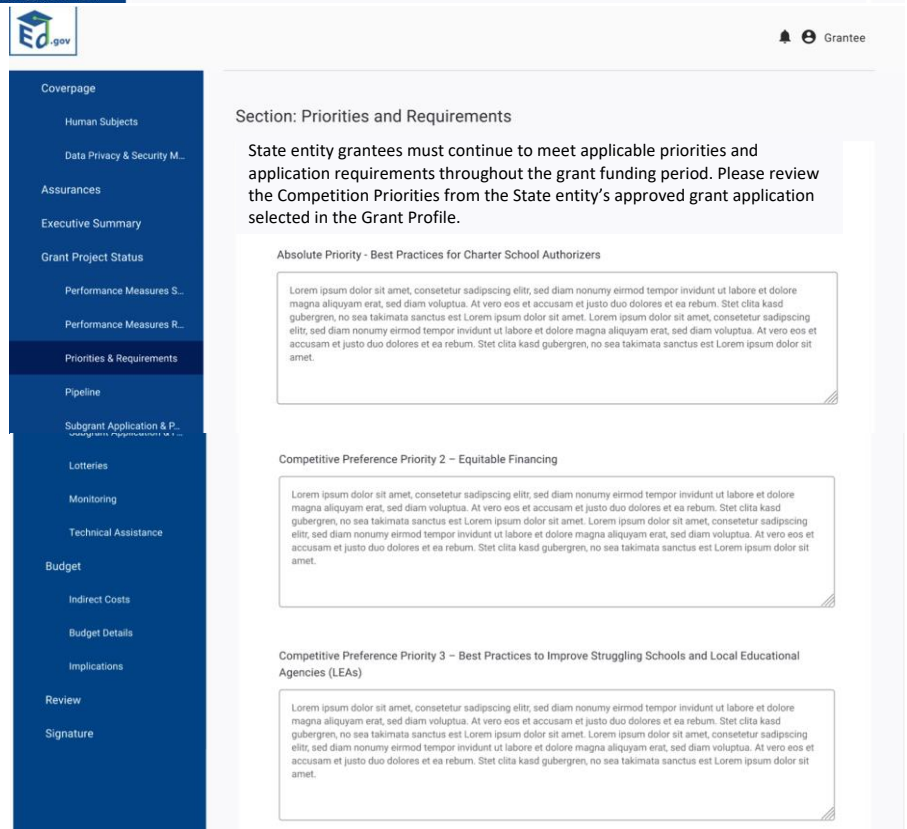
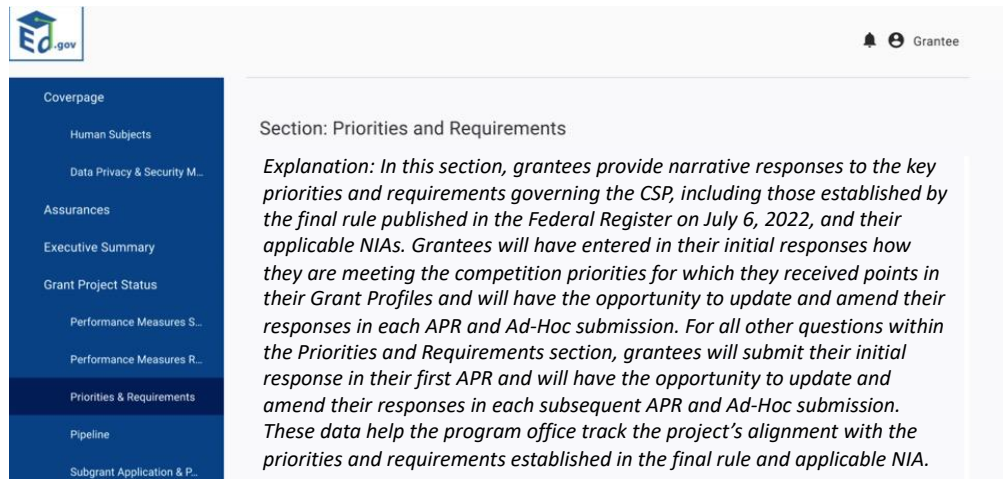
Actual

Description of progress (include challenges faced if any)

If the State Entity grantee has not met this measure, describe how and when it will be met, and outline any steps and/or strategies the grantee plans to help ensure continued progress.

4.3.9 Grant Project Status – Priorities & Requirements – Competition Priorities

1. On the subsequent page, Grantees will see and review the competition priorities from their approved grant application that were entered in the Grant Profile.
2. If there have been changes since they were first entered, Grantees will click Yes and then be able to edit the information on the page.



Note: Submission of proposed changes via the APR does not equate to approval of the changes by the CSP Program Office.

Have there been any changes to how the State Entity grantee addresses these priorities in the current budget period?

Yes

No

If yes, describe the change, including whether the CSP Office approved it.

< Back

Save & Continue

4.3.10 Grant Project Status – Priorities & Requirements – Racially and Socio-Economically Diverse Schools

1. From there, Grantees will describe their efforts to address the racially and socio-economical diverse school requirement.
2. Grantees will click save and continue.

The screenshot shows the Ed.gov application interface. On the left is a dark blue navigation menu with the following items: Coverpage, Human Subjects, Data Privacy & Security M..., Assurances, Executive Summary, Grant Project Status, Performance Measures S..., Performance Measures R..., Priorities & Requirements (highlighted), Pipeline, Subgrant Application & P..., and Lotteries. The main content area is titled 'Section: Priorities and Requirements'. Below this title is a section header 'Racially and Socio-Economically Diverse Schools'. The text reads: 'State entity grantees must ensure that (a) subgrantees and grant-funded activities establish and maintain a racially and socio-economically diverse student body, or (b) discuss why the State entity grantee and subgrantees are unable to establish and maintain a racially and socio-economically diverse student body and the impact it has on students.' Below this text is a prompt: 'Please describe the State Entity grantee's efforts to address these requirements.' and a large, empty rectangular text input box with a small cursor icon in the bottom right corner. In the top right corner of the application, there is a notification bell icon and the text 'Grantee'.

4.3.11 Grant Project Status – Priorities & Requirements – Notification of Subgrant Funds

1. On the next page, Grantees will upload their most recent RFA, or indicate that no competition has been announced and that their RFA has not yet been finalized.
2. Grantees will also be required to enter information about how they notified other parties about the availability of subgrant funds.

EU.gov

Grantee

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Signature

Section: Priorities and Requirements

Notification of Subgrant Funds Availability

State entity grantees must administer a subgrant application process that adheres to the required descriptions and assurances. Please attach the State entity grantee's most recent Request for Applications (RFA) with the APR submission.

Upload most recent RFA

Upload file below:

Drop files here to upload or click to choose file

No competition announced yet and RFA not yet finalized.

How did the State Entity grantee notify eligible charter schools, developers and authorized public chartering agencies of the availability of subgrant funds?

< Back

Save & Continue

Monitoring

Technical Assistance

Budget

Indirect Costs

Budget Details

Implications

Review

Signature

No competition announced yet and RFA not yet finalized.

If the State Entity grantee still needs to finalize its RFA, please explain, and provide the anticipated RFA completion date

Anticipated Date of RFA Availability

MM/DD/YYYY

4.3.12 Grant Project Status – Priorities & Requirements – Access to Federal Funds

1. On the next page, Grantees will enter information related to access to Federal Funds, intended use of subgrantee funds and sustainability of subgrantees.

The screenshot displays the Ed.gov application interface. On the left is a dark blue navigation sidebar with a white 'Ed.gov' logo at the top. The sidebar contains a list of menu items: Coveragepage, Human Subjects, Data Privacy & Security M..., Assurances, Executive Summary, Grant Project Status, Performance Measures S..., Performance Measures R..., Priorities & Requirements (highlighted in white), Pipeline, Subgrant Application & P..., Lotteries, Monitoring, Technical Assistance, Budget, Indirect Costs, Budget Details, Implications, Review, and Signature. The main content area is white and titled 'Section: Priorities and Requirements' in the top right. It features three distinct sections, each with a heading, explanatory text, and a question followed by a large empty text box for input:

- Access to Federal Funds:** State entity grantees must ensure charter schools funded by the CSP have equitable access to other Federal funds they are eligible to receive. Federal funds include formula funding, not other discretionary grants. Question: How does the State entity grantee ensure eligible applicants are aware of and can access other Federal funds?
- Intended Use of Subgrantee Funds:** State entity grantees must ensure subgrantees use funds in accordance with the terms and conditions of their approved application and that all costs are necessary, reasonable, and allocable to the grant. Question: How does the State entity grantee ensure subgrantees are using subgrant funds for their intended uses (e.g., the creation of a new charter school, the replication of a high-quality charter school, or the expansion of a high-quality charter school)?
- Sustainability of Subgrantees:** CSP funds are a temporary funding stream. State entity grantees must ensure that subgrantees have appropriate sustainability plans and fiscal controls in place to enable the charter school to continue operating beyond the grant period. Question: How does the State entity grantee ensure the financial sustainability of charter school subgrantees to ensure they can continue to operate beyond the grant period?

4.3.13 Grant Project Status – Priorities & Requirements – Authorizers

1. On the next page, depending on the organization type (SEA or Other SE), Grantees will enter information related to authorizers and authorizer activities/oversight.

The image displays two screenshots of the Ed.gov interface. The top screenshot is for State Educational Agencies (SEA) and the bottom screenshot is for other State Entities (SE). Both show a navigation menu on the left and a main content area on the right. The 'Priorities & Requirements' menu item is highlighted in both. The main content area contains a section titled 'Authorizers' with specific instructions and a text input box.

Ed.gov Grantee

Section: Priorities and Requirements **For State Entity Agencies (SEA) only**

Authorizers

In some State contexts, State Educational Agencies must provide oversight of authorizing activities, including how the State will help ensure better authorizing.

How does the State entity grantee's State provide oversight of authorizing activities? (For State Educational Agencies only)

Ed.gov Grantee

Section: Priorities and Requirements **For State Entity (SE) only**

Authorizers

State entity grantees must support the State's efforts to provide oversight of authorizing activities, including working with the State to help ensure better authorizing practices.

How does the State entity grantee work with the State to support the State's system of technical assistance and oversight of charter school authorizers? (For other State entities only)

4.3.14 Grant Project Status – Priorities & Requirements – Best and promising practices

1. Next, Grantees would enter their best and promising practices.
2. If they select No, they will move to the next section.
3. If they select Yes, they will be asked to enter how they determined the practices, and to select all the mechanisms they used to share the practices.

The screenshots show a web application interface for grant project status reporting. The interface includes a navigation menu on the left and a main content area on the right. The top right corner of each screenshot shows a notification bell icon and the text 'Grantee'.

Screenshot 1: The navigation menu is visible, with 'Priorities & Requirements' highlighted. The main content area shows the 'Section: Priorities and Requirements' and 'Best and Promising Practices' section. It contains the text: 'Part of the aim of the CSP is to disseminate knowledge and best practices to the charter school sector overall as well as traditional public schools.' Below this is a question: 'Did the State entity grantee share best and promising practices between charter schools and other public schools during the current budget period?' with radio button options for 'Yes' and 'No'. The 'No' option is selected. A '< Back' button is on the bottom left and a 'Continue' button is on the bottom right.

Screenshot 2: The navigation menu is visible, with 'Priorities & Requirements' highlighted. The main content area shows the 'Section: Priorities and Requirements' and 'Best and Promising Practices' section. It contains the text: 'Part of the aim of the CSP is to disseminate knowledge and best practices to the charter school sector overall as well as traditional public schools.' Below this is a question: 'Did the State entity grantee share best and promising practices between charter schools and other public schools during the current budget period?' with radio button options for 'Yes' and 'No'. The 'Yes' option is selected. Below the question is another question: 'How does the State Entity grantee determine best and promising practices?' followed by a large empty text input box. A '< Back' button is on the bottom left and a 'Continue' button is on the bottom right.

Screenshot 3: The navigation menu is visible, with 'Technical Assistance' highlighted. The main content area shows the question: 'What mechanisms does the State entity grantee use to share these practices? (Select all that apply).' Below the question are four checkbox options: 'Conference Presentations', 'Listserv', 'Website', and 'Other'. A '< Back' button is on the bottom left and a 'Save & Continue' button is on the bottom right.

4.3.15 Grant Project Status – Priorities & Requirements – Closure Plans

1. On the next page, Grantees, will see their submitted Closure Plan.
2. If there are any changes to it during the current budget period, the Grantee is required to describe the changes.

The screenshot shows a web interface for a grantee. On the left is a dark blue sidebar menu with the following items: Coverpage, Human Subjects, Data Privacy & Security M..., Assurances, Executive Summary, Grant Project Status, Performance Measures S..., Priorities & Requirements (highlighted), Pipeline, Subgrant Application & P..., Lotteries, Monitoring, Technical Assistance, Budget, Indirect Costs, Budget Details, Implications, Review, and Signature. The main content area is titled 'Section: Priorities and Requirements'. It contains a section for 'Closure Plans' with a document upload area showing 'Closure_Plan.docx (71MB)'. Below this is a question: 'Were there any changes to the State Entity grantee's Closure Plan in the current budget period?' with radio buttons for 'Yes' (selected) and 'No'. Underneath is a text box labeled 'If yes, please describe the changes.' At the bottom of the form are two buttons: '< Back' and 'Save & Continue'. The top right corner shows a notification bell icon and the text 'Grantee'.

4.3.16 Grant Project Status – Pipeline

1. Data Grantees submitted in the School/Subgrant Data module will be fed directly into the Pipeline table in their APR (number of schools by subgrant type)
2. Grantees will only be responsible for entering the number of projected subgrants during the remainder of the current reporting period.
3. They then enter dates of future subgrant competitions and awards.
4. If they select No, they are prompted to explain.
5. If dates are unknown, they will have to explain the reasoning (see last screenshot).

Section: Pipeline

Explanation: Grantees' approved pipeline for the applicable APR submission budget period (column 1) will come from the Grant Profile. The pipeline data for the current reporting period (column 2) will come directly from the data submitted in the School/Subgrant Data Collection module in COMPS. Grantees will only be responsible for entering data for the projected number of subgrants by type for the remainder of the current budget period in each APR submission (column 3). Grantees will not need to enter any pipeline data into the table for their Ad-Hoc reports since the data from the School/Subgrant Data Collection module at the Ad-Hoc submission would be inclusive of the entire budget period. Grantees must answer all applicable narrative questions in each APR and Ad-Hoc submission. These data help the program office track the number of schools funded by the grant.

Section: Pipeline

Pipeline refers to the number of anticipated charter schools that will be awarded CSP subgrants under the State entity grantee's grant.

	Current Budget Period (MM/YYYY - MM/YYYY)	Current Reporting Period (MM/YYYY - MM/YYYY)	Remainder of Current Budget Period (MM/YYYY - MM/YYYY)
Number of start-up subgrants	<input type="text"/>	<input type="text"/>	<input type="text"/>
Number of expansion subgrants	<input type="text"/>	<input type="text"/>	<input type="text"/>
Number of replication subgrants	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total subgrant awards	<input type="text"/>	<input type="text"/>	<input type="text"/>

Is the State Entity grantee on track to meet the projected number of subgrants for the current budget period?

Yes

Future subgrant competitions

Projected date of next subgrant competition

Date unknown

Future subgrant awards

Projected date of next subgrant award

Date unknown

Does the State Entity grantee intend to fully award the approved number of subgrant awards during the next budget period?

Yes

No

If they select No to the question below, they are prompted to provide additional information.

The screenshot shows a dark blue navigation menu on the left with the following items: Budget, Indirect Costs, Budget Details, Implications, Review, and Signature. The main content area contains the question: "Is the State Entity grantee on track to meet the projected number of subgrants for the current budget period?". Below the question, the "No" radio button is selected. A text box for providing additional information is visible below the question.

If they select No to the question below, they are prompted to provide additional information.

The screenshot shows a dark blue navigation menu on the left. The main content area contains the question: "Does the State Entity grantee intend to fully award the approved number of subgrant awards during the next budget period?". Below the question, the "No" radio button is selected. A text box for providing additional information is visible below the question.

If they select date unknown, they are prompted to explain.

The screenshot shows a dark blue navigation menu on the left. The main content area contains the question: "Date unknown". Below the question, the "Date unknown" checkbox is checked. A text box for providing an explanation is visible below the question.

4.3.17 Grant Project Status – Subgrant Application and Peer Review

1. In the next section, Grantees enter their subgrant application information.

Ed.gov

Grantee

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Section: Subgrant Application & Peer Review

Subgrant Application

State entity grantees must administer subgrant application processes that adhere to the statutory and regulatory requirements and descriptions and assurances provided in the grantee's approved application.

Has the State Entity grantee run a subgrant competition under the current grant?

Yes

No

< Back

Save & Continue

4.3.17.1 If No - Subgrant Application and Peer Review

2. If No they are prompted to explain.

Ed.gov

Grantee

Coverpage

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Data Privacy & Security M...

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Performance Measures R...

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Section: Subgrant Application & Peer Review

Subgrant Application

State entity grantees must administer subgrant application processes that adhere to the statutory and regulatory requirements and descriptions and assurances provided in the grantee's approved application.

Has the State Entity grantee run a subgrant competition under the current grant?

Yes

No

If not, please explain

4.3.17.2 If Yes - Subgrant Application and Peer Review

3. If Yes a second question appears.

Ed.gov

Grantee

Coverpage

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Assurances

Executive Summary

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Performance Measures R...

Priorities & Requirements

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Subgrant Application & P...

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Monitoring

Section: Subgrant Application & Peer Review

Subgrant Application

State Entity grantees must administer subgrant application processes that adhere to the required descriptions and assurances.

Has the State Entity grantee run a subgrant competition under the current grant?

Yes

No

Is this the first year the State Entity grantee has run a subgrant competition?

Yes

No

4.3.17.3 If Yes, Yes - Subgrant Application and Peer Review

4. If Yes to both questions, three required questions display, as depicted on the right.

CO.gov Grantee

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Data Privacy & Security M...

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Signature

Section: Subgrant Application & Peer Review

Subgrant Application

State Entity grantees must administer subgrant application processes that adhere to the required descriptions and assurances.

Has the State Entity grantee run a subgrant competition under the current grant?

Yes

No

Is this the first year the State Entity grantee has run a subgrant competition?

Yes

No

Please describe the following elements of the State Entity grantee's subgrant application process:

Cost analysis and budget review of subgrant applications

Assessment of subgrant applicant risk

Funding determinations for subgrant awards

< Back

Save & Continue

4.3.17.4 If Yes, No, No, No - Subgrant Application and Peer Review

5. In the initial submission of the APR, if Grantees select Yes, No, No, No to the radio buttons, the following questions will be required.

EC.gov

Grantee

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Budget

Indirect Costs

Budget Details

Implications

Review

Signature

Section: Subgrant Application & Peer Review

Subgrant Application

State Entity grantees must administer subgrant application processes that adhere to the required descriptions and assurances.

Has the State Entity grantee run a subgrant competition under the current grant?

Yes

No

Is this the first year the State Entity grantee has run a subgrant competition?

Yes

No

Please describe the following elements of the State Entity grantee's subgrant application process:

Cost analysis and budget review of subgrant applications

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Assessment of subgrant applicant risk

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Funding determinations for subgrant awards

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Have there been any changes to the State Entity grantee's subgrant application processes?

Yes

No

Did the State Entity grantee's subgrant application require applicants to submit a needs analysis for their proposed project?

Yes

No

If no, please explain:

Did the State Entity grantee offer priority for subgrant applicants proposing projects that include the following?

- Meaningful and ongoing engagement with current or former teachers or other educators
- Using a community-centered approach

< Back

Save & Continue

4.3.17.5 If Yes, No Subsequent Reports - Subgrant Application and Peer Review

- 6. In subsequent APR reports if Grantees submissions, if Grantees select Yes, No, No, No to the radio buttons, the following questions will be required.

The screenshot shows the Ed.gov interface for a Subgrant Application & Peer Review. On the left is a dark blue navigation sidebar with the following menu items: Coverpage, Human Subjects, Data Privacy & Security M..., Assurances, Executive Summary, Grant Project Status, Performance Measures S..., Performance Measures R..., Priorities & Requirements, Pipeline, Subgrant Application & P. (highlighted), Lotteries, Monitoring, Technical Assistance, Budget, Indirect Costs, Budget Details, Implications, Review, and Signature. The main content area is titled 'Section: Subgrant Application & Peer Review' and includes a 'Subsequent reports' link. The form content includes: a heading 'Subgrant Application', a paragraph stating 'State Entity grantees must administer subgrant application processes that adhere to the required descriptions and assurances.', two radio button questions: 'Has the State Entity grantee run a subgrant competition under the current grant?' (Yes selected) and 'Is this the first year the State Entity grantee has run a subgrant competition?' (No selected), a text prompt 'Please describe the following elements of the State Entity grantee's subgrant application process:', a section for 'Cost analysis and budget review of subgrant applications' with a text area containing placeholder text, a section for 'Assessment of subgrant applicant risk' with a text area containing placeholder text, a section for 'Funding determinations for subgrant awards' with a text area containing placeholder text, and two final radio button questions: 'Have there been any changes to the State Entity grantee's subgrant application processes?' (No selected) and 'Did the State Entity grantee's subgrant application require applicants to submit a needs analysis for their proposed project?' (No selected).

If no, please explain:

Did the State Entity grantee offer priority for subgrant applicants proposing projects that include the following?

- Meaningful and ongoing engagement with current or former teachers or other educators
- Using a community-centered approach

< Back

Save & Continue

4.3.17.6 If Yes, No, Yes, No - Subgrant Application and Peer Review

7. In the subsequent APR report submission, if Grantees select Yes, No, Yes, No to the radio buttons, the following questions will be required and the previously entered fields will become editable for grantees to enter new information, or adapts their previous response.

Ed.gov Grantee

Section: Subgrant Application & Peer Review

Subgrant Application

State Entity grantees must administer subgrant application processes that adhere to the required descriptions and assurances.

Has the State Entity grantee run a subgrant competition under the current grant?

Yes
 No

Is this the first year the State Entity grantee has run a subgrant competition?

Yes
 No

Please describe the following elements of the State Entity grantee's subgrant application process:

Cost analysis and budget review of subgrant applications

Assessment of subgrant applicant risk

Funding determinations for subgrant awards

Note: Submission of proposed changes via APR does not equate to approval by the CSP

Have there been any changes to the State Entity grantee's subgrant application processes?

Yes
 No

Did the State Entity grantee's subgrant application require applicants to submit a needs analysis for their proposed project?

Yes
 No

If no, please explain:

Did the State Entity grantee offer priority for subgrant applicants proposing projects that include the following?

Meaningful and ongoing engagement with current or former teachers or other educators
 Using a community-centered approach

Please provide the website URL where the State entity grantee publicly posts subgrant award information.

Website not yet established

If the State Entity grantee has yet to publish the website, please explain.

4.3.17.7 If Yes, No, Yes, No Checked Boxes - Subgrant Application

- 8. In the subsequent APR report submission, if Grantees select Yes, No, Yes, No to the radio buttons, and they check the boxes, they will be required to enter additional descriptions and context.

Ed.gov Grantee

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Signature

Section: Subgrant Application & Peer Review

Subgrant Application

State Entity grantees must administer subgrant application processes that adhere to the required descriptions and assurances.

Has the State Entity grantee run a subgrant competition under the current grant?

Yes

No

Is this the first year the State Entity grantee has run a subgrant competition?

Yes

No

Please describe the following elements of the State Entity grantee's subgrant application process:

Description of cost analysis and budget review

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Assessment of applicant risk

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How funding decisions will be made

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Note: Submission of proposed changes via APR does not equate to approval by the CSP

Have there been any changes to the grantee's subgrant application processes?

Yes

No

Did the State Entity grantee's subgrant application require applicants to submit a needs analysis for their proposed project?

Yes

No

If no, please explain:

Did the State Entity grantee offer priority for subgrant applicants proposing projects that include the following?

- Meaningful and ongoing engagement with current or former teachers or other educators

Describe how the grantee gave priority to applicants proposing projects with this approach.

- Using a community-centered approach

Describe how the grantee gave priority to applicants proposing projects with this approach.

Please provide a link to the website where the grantee publicly posts subgrant award information.

- Website not yet established

Please explain why subgrant award information is not yet posted publicly.

[← Back](#)

[Save & Continue](#)

4.3.18 Grant Project Status – Peer Review

1. In the next section Grantees will select if they conduct a peer review of subgrant applications.

Ed.gov logo and user name: Grantee

Section: Subgrant Application & Peer Review

Peer Review of Subgrant Applications

State entity grantees must utilize a peer review process to make subgrant awards.

Did the State Entity grantee conduct a peer review of subgrant applications during the current budget period?

Yes

No

< Back Save & Continue

4.3.18.1 If Yes – Peer Review

2. If they select Yes, an additional question will appear if it's their first year conducting a peer review.

Ed.gov logo and user name: Grantee

Section: Subgrant Application & Peer Review

Peer Review of Subgrant Applications

State entity grantees must utilize a peer review process to make subgrant awards.

Did the State Entity grantee conduct a peer review of subgrant applications during the current budget period?

Yes

No

Is this the first year the State Entity grantee has conducted a peer review of subgrant application?

Yes

No

4.3.18.2 If No – Peer Review

3. If Grantees select No to the first question, they must provide an explanation.

The screenshot shows a sidebar menu on the left with the following items: Data Privacy & Security M..., Assurances, Executive Summary, Grant Project Status, Performance Measures S..., Performance Measures R..., Priorities & Requirements, Pipeline, Subgrant Application & P. (highlighted), Lotteries, Monitoring, Technical Assistance, Budget, Indirect Costs, Budget Details, and Implications. The main content area is titled 'Peer Review of Subgrant Applications' and contains the text: 'State entity grantees must utilize a peer review process to make subgrant awards.' Below this is the question: 'Did the State Entity grantee conduct a peer review of subgrant applications during the current budget period?' with radio buttons for 'Yes' and 'No'. The 'No' option is selected. Below the question is a text box labeled 'If not, please explain.' with a large empty area for input. At the bottom left is a '< Back' button and at the bottom right is a 'Save & Continue' button.

4.3.18.3 If Yes, Yes – Peer Review

4. If Grantees select Yes and then Yes, the following questions display below.

The screenshot shows the same sidebar menu as above. The main content area is titled 'Section: Subgrant Application & Peer Review' and 'Peer Review of Subgrant Applications'. It contains the same introductory text and question: 'Did the State Entity grantee conduct a peer review of subgrant applications during the current budget period?' with radio buttons for 'Yes' and 'No'. The 'Yes' option is selected. Below this is the question: 'Is this the first year the State Entity grantee has conducted a peer review of subgrant application?' with radio buttons for 'Yes' and 'No'. The 'Yes' option is selected. Below these questions is the text: 'Please describe the following elements of the State Entity grantee's peer review process:'. There are two text boxes for input: 'Identification and selection of peer reviewers' and 'Training and norming of peer reviewers'. At the top right of the main content area, there is a 'Grantee' label with a notification bell icon.

Use of peer reviewer scores in awarding subgrants

Discuss peer review process successes the State Entity grantee has encountered during the current reporting period (e.g., recruitment of high-quality reviewers).

Discuss peer review process challenges the State Entity grantee has encountered during the current reporting period (e.g., low numbers of reviewers, conflicting peer review scores).

[← Back](#)

[Save & Continue](#)

4.3.18.4 If Yes, No, No – Peer Review

5. If it's a subsequent APR report and Grantees select Yes, No, No, then their original response will be displayed (greyed out).
6. Grantees will also be required to input the successes/challenges with their peer review process.

ED.gov

Grantee

Section: Subgrant Application & Peer Review

Peer Review

Tell us about the grantee's peer review process

Did the State Entity grantee conduct a peer review of subgrant applications during the current budget period?

Yes
 No

Is this the first year the State Entity grantee has conducted a peer review of subgrant application?

Yes
 No

Please describe the following elements of the State Entity grantee's peer review process:

Identification and selection of peer reviewers

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Training and norming of peer reviewers

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Use of peer reviewer scores in awarding subgrants

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Have there been any changes to the State Entity grantee's subgrant application processes?

Yes
 No

Discuss peer review process successes the State Entity grantee has encountered during the current reporting period (e.g., recruitment of high-quality reviewers).

Discuss peer review process challenges the State Entity grantee has encountered during the current reporting period (e.g., low numbers of reviewers, conflicting peer review scores).

[← Back](#)

[Save & Continue](#)

4.3.18.5 If Yes, No, Yes – Peer Review

- 7. If it's a subsequent APR report and Grantees selects Yes, No, Yes, then their original response will be editable.
- 8. Grantees will also be required to input the successes/challenges with their peer review process.

Ed.gov

Grantee

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Section: Subgrant Application & Peer Review

Peer Review

Tell us about the grantee's peer review process

Did the State Entity grantee conduct a peer review of subgrant applications during the current budget period?

Yes

No

Is this the first year the State Entity grantee has conducted a peer review of subgrant application?

Yes

No

Please describe the following elements of the grantee's peer review process

Identification and selection of peer reviewers

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Training and norming of peer reviewers

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Use of peer reviewer scores in awarding subgrants

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Note: Submission of proposed changes via APR does not equate to approval by the CSP

Have there been any changes to the State Entity grantee's subgrant application processes?

Yes

No

Discuss peer review process successes the State Entity grantee has encountered during the current reporting period (e.g., recruitment of high-quality reviewers).

Discuss peer review process challenges the State Entity grantee has encountered during the current reporting period (e.g., low numbers of reviewers, conflicting peer review scores).

< Back

Save & Continue

4.3.19 Grant Project Status – Lotteries

1. In the next section, Grantees will see their submitted lottery requirements and select if there have been any changes to the information.

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Monitoring

Section: Lotteries

Explanation: This section shows back grantees' responses to the Lottery section in the Grant Profile, which collects information on the lottery requirements grantees must meet, and asks whether there have been any updates. Grantees will have an opportunity to update and amend their responses to the Lottery section in each APR and Ad-Hoc submission.

Grantees must ensure that lottery policies comply with State and Federal requirements.

< Back Save & Continue

Have there been any changes to the State Entity grantee's lottery information?

Yes
 No

Upload file below:

Drop files here to upload or click to choose file

Lottery

Uploaded File(s):

Student_Enrollment_Lorttery_Policy.docx (50MB)

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Does the grantee's Lottery Plan include weights?

Yes
 No

Is the grantee's Lottery Plan approved?

Yes
 No

Which allowable preferences are included in the grantees lottery policy?

Sibling
 Children of school founders
 Children of employees
 Other

If other, please specify

4.3.20 Grant Project Status – Monitoring

4.3.20.1 Grant Project Status – Monitoring, If Yes

1. In the next section, Grantees will respond to their subgrantee monitoring practices.

EO.gov

Grantee

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Section: Subgrantee Monitoring

State Entity grantees must conduct regular and systematic monitoring of subgrantees throughout the grant period.

Did the State Entity grantee monitor subgrantees during the current reporting period?

Yes

No

Does the State Entity grantee have a written subgrant monitoring plan?

Yes

No

Does the subgrant monitoring plan include a timeline for monitoring?

Yes

No

Does the State Entity grantee use a risk assessment to select subgrantees for monitoring?

Yes

No

How does the State Entity grantee monitor subgrantee compliance and performance? (Select all that apply).

Annual reporting

Quarterly reporting

Desk monitoring

Regular check-in calls

Site visits

Other

What content does the State Entity grantee's subgrant monitoring cover? (Select all that apply).

Assurances

Definition of charter school

Fiscal controls

Management organization contracts

Meeting the educational needs of children with disabilities

Meeting the educational needs of english learners

Open meetings and records

School racial and socio-economic diversity and/or desegregation requirements

Subgrantees publishing required data on their websites

Subgrant performance

Transportation needs

Use of funds

Other

< Back

Save & Continue

4.3.20.2 Grant Project Status – Monitoring, If Yes, Yes, Yes, Yes

2. If they select Yes and Yes, they will be asked to upload their subgrant monitoring plan.

The screenshot displays the Ed.gov application interface. On the left is a dark blue navigation sidebar with the following menu items: Coverpage, Human Subjects, Data Privacy & Security M..., Assurances, Executive Summary, Grant Project Status, Performance Measures S..., Performance Measures R..., Priorities & Requirements, Pipeline, Subgrant Application & P..., Lotteries, Monitoring (highlighted), Technical Assistance, Budget, Indirect Costs, Budget Details, Implications, Review, and Signature. The main content area is titled 'Section: Subgrantee Monitoring' and contains the following text and questions:

State Entity grantees must conduct regular and systematic monitoring of subgrantees throughout the grant period.

Did the State Entity grantee monitor subgrantees during the current reporting period?
 Yes
 No

Does the State Entity grantee have a written subgrant monitoring plan?
 Yes
 No

Please upload the State Entity grantee's subgrant monitoring plan

Drop files here to upload or click to choose file

Does the subgrant monitoring plan include a timeline for monitoring?
 Yes
 No

Does the State Entity grantee use a risk assessment to select subgrantees for monitoring?
 Yes
 No

How does the State Entity grantee monitor subgrantee compliance and performance? (Select all that apply).

- Annual reporting
- Quarterly reporting
- Desk monitoring
- Regular check-in calls
- Site visits
- Other

What content does the State Entity grantee's subgrant monitoring cover? (Select all that apply).

- Assurances
- Definition of charter school
- Fiscal controls
- Management organization contracts
- Meeting the educational needs of children with disabilities
- Meeting the educational needs of english learners
- Open meetings and records
- School racial and socio-economic diversity and/or desegregation requirements
- Subgrantees publishing required data on their websites
- Subgrant performance
- Transportation needs
- Use of funds
- Other

At the bottom of the form, there is a '< Back' button on the left and a 'Save & Continue' button on the right.

4.3.20.3 Grant Project Status – Monitoring, If Yes, Yes, Yes, Yes, Other, Other

3. If they select Yes and Other in the checkboxes, they will be asked to specify.

The screenshot shows the Ed.gov interface for the 'Monitoring' section of a grant project status report. The left sidebar contains a navigation menu with the following items: Coverpage, Human Subjects, Data Privacy & Security M..., Assurances, Executive Summary, Grant Project Status, Performance Measures S..., Performance Measures R..., Priorities & Requirements, Pipeline, Subgrant Application & P..., Lotteries, Monitoring (highlighted), Technical Assistance, Budget, Indirect Costs, Budget Details, Implications, Review, and Signature. The main content area is titled 'Section: Subgrantee Monitoring' and contains the following questions and options:

State Entity grantees must conduct regular and systematic monitoring of subgrantees throughout the grant period.

Did the State Entity grantee monitor subgrantees during the current reporting period?
 Yes
 No

Does the State Entity grantee have a written subgrant monitoring plan?
 Yes
 No

Please upload the State Entity grantee's subgrant monitoring plan

Drop files here to upload or click to choose file

Does the subgrant monitoring plan include a timeline for monitoring?
 Yes
 No

Does the State Entity grantee use a risk assessment to select subgrantees for monitoring?
 Yes
 No

How does the State Entity grantee monitor subgrantee compliance and performance? (Select all that apply).
 Annual reporting
 Quarterly reporting
 Desk monitoring
 Regular check-in calls
 Site visits
 Other
Please specify

What content does the State Entity grantee's subgrant monitoring cover? (Select all that apply).
 Assurances
 Definition of charter school
 Fiscal controls
 Management organization contracts
 Meeting the educational needs of children with disabilities
 Meeting the educational needs of english learners
 Open meetings and records
 School racial and socio-economic diversity and/or desegregation requirements
 Subgrantees publishing required data on their websites
 Subgrant performance
 Transportation needs
 Use of funds
 Other
Please specify

At the bottom of the form, there are navigation buttons: '< Back' on the left and 'Save & Continue' on the right.

4.3.20.4 Grant Project Status – Monitoring, If No, No, No, No

4. If they select No for any of the options, they will be asked to explain.

Ed.gov

Grantee

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Section: Subgrantee Monitoring

State Entity grantees must conduct regular and systematic monitoring of subgrantees throughout the grant period.

Did the State Entity grantee monitor subgrantees during the current reporting period?

Yes

No

If no, please explain

Does the State Entity grantee have a written subgrant monitoring plan?

Yes

No

If no, please explain

Does the subgrant monitoring plan include a timeline for monitoring?

Yes

No

If no, please explain

Does the State Entity grantee use a risk assessment to select subgrantees for monitoring?

Yes

No

If no, please explain

How does the State Entity grantee monitor subgrantee compliance and performance? *(Select all that apply).*

Annual reporting

Quarterly reporting

Desk monitoring

Regular check-in calls

Site visits

Other

What content does the State Entity grantee's subgrant monitoring cover? *(Select all that apply).*

- Assurances
- Definition of charter school
- Fiscal controls
- Management organization contracts
- Meeting the educational needs of children with disabilities
- Meeting the educational needs of english learners
- Open meetings and records
- School racial and socio-economic diversity and/or desegregation requirements
- Subgrantees publishing required data on their websites
- Subgrant performance
- Transportation needs
- Use of funds**
- Other

[← Back](#)

[Save & Continue](#)

4.3.21 Grant Project Status – Subgrant Monitoring

1. On the next page Grantees will enter information around who is conducting the monitoring.
2. If they select other, they will need to specify.
3. If they select no for the question “are subgrantee monitors trained” then they will have to explain.



State Entity grantees must conduct regular and systematic monitoring of subgrantees throughout the grant period.

Who conducts monitoring to assess subgrantee compliance and performance? *(Select all that apply)*

State Entity grantee staff

Contractor/consultant

Other

Please specify

Are subgrantee monitors trained?

Yes

No

If no, please explain

4.3.22 Grant Project Status – Technical Assistance – Subgrant

1. On the next section, Grantees will be prompted to enter information pertaining to technical assistance to subgrantees.
2. If they select Yes to whether the SE grantees conduct a needs assessment, they will enter a date.
3. If they select No, they will have to explain why not.
4. Underneath the questions, the grantee will have to answer all the forms of technical assistance they offer as well as the type of content

The screenshot displays the Ed.gov application interface. On the left is a dark blue navigation sidebar with a list of menu items: Coverpage, Human Subjects, Data Privacy & Security M..., Assurances, Executive Summary, Grant Project Status, Performance Measures S..., Performance Measures R..., Priorities & Requirements, Pipeline, Subgrant Application & P..., Lotteries, Monitoring, Technical Assistance (highlighted), Budget, Indirect Costs, Budget Details, Implications, Review, and Signature. The main content area is titled 'Section: Technical Assistance' and 'Technical Assistance to Subgrantees'. It contains a text box for describing the State Entity grantee's aims and objectives. Below this are two questions: 'How does the State Entity grantee determine the technical assistance topics for subgrantees to fund each budget period?' and 'Has the State Entity grantee conducted a needs assessment to identify subgrantee technical assistance needs?'. The first question has a text input field. The second question has radio buttons for 'Yes' and 'No', with 'No' selected. Below it is a date input field with a calendar icon. The third question is identical to the second, also with 'No' selected, followed by a text input field for explanation.

What forms of technical assistance does the State Entity grantee provide subgrantees? *(Select all that apply).*

- Application process technical assistance
- Contract with a vendor to work with applicants
- Contract with a vendor to work with subgrantees
- Host a subgrantee learning community
- Identify and/or recruit potential applicants
- Provide governing board training
- Provide pre-award workshop or webinar
- Provide post-award workshop or webinar
- Share resources for grant applicants
- Share resources on operating/opening a school
- Share grants management resources
- Other

Please specify

What content does the State Entity grantee's subgrant technical assistance cover? *(Select all that apply).*

- Accessibility and equity
- Fiscal control and fund accounting procedures
- Inclusive recruitment, enrollment, and retention
- Meeting needs of children with disabilities
- Meeting needs of English learners
- Reducing use of exclusionary discipline practices
- School quality
- Other

Please describe the impact or anticipated impact of the State Entity grantee's technical assistance activities with subgrantees and any related successes and challenges.

If Grantees select Contract with a Vendor, they will be prompted to enter additional information.



What forms of technical assistance does the State Entity grantee provide subgrantees? *(Select all that apply).*

- Application process technical assistance
- Contract with a vendor to work with applicants
- Contract with a vendor to work with subgrantees
- Host a subgrantee learning community
- Identify and/or recruit potential applicants
- Provide governing board training
- Provide pre-award workshop or webinar
- Provide post-award workshop or webinar
- Share resources for grant applicants
- Share resources on operating/opening a school
- Share grants management resources
- Other

If the grantee has a contract with a vendor, please describe the roles and responsibilities of the partner in carrying out technical assistance activities with subgrantees.

If Grantees select the following two checkboxes, they will have to describe the selection:



What content does the State Entity grantee's subgrant technical assistance cover? *(Select all that apply).*

- Accessibility and equity
- Fiscal control and fund accounting procedures
- Inclusive recruitment, enrollment, and retention
- Meeting needs of children with disabilities
- Meeting needs of English learners
- Reducing use of exclusionary discipline practices
- School quality
- Other

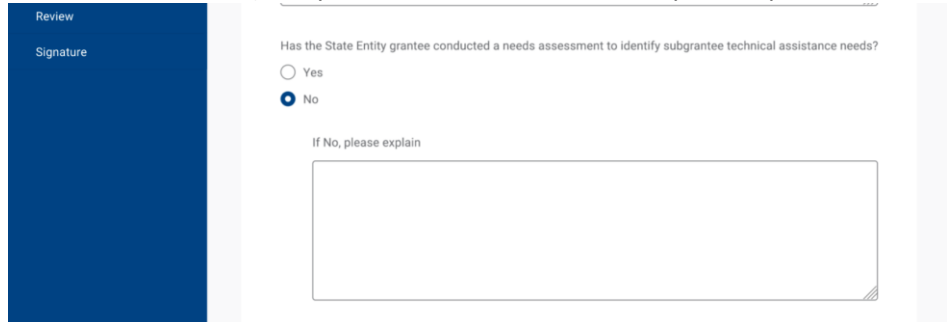
Please describe the specific technical assistance activities it provided and related successes and challenges. Please also note if the State entity grantee used any other funds (Federal or other) to support these technical assistance activities.

4.3.23 Grant Project Status – Technical Assistance – TA to Authorizers

1. On the next page, Grantees will be prompted to describe their technical assistance to authorizers.
2. If they select yes to whether they have conducted a needs assessment, the grantee will be prompted to enter a date.

The screenshot displays the Eo.gov portal interface. On the left is a dark blue navigation sidebar with the following menu items: Coverpage, Human Subjects, Data Privacy & Security M..., Assurances, Executive Summary, Grant Project Status, Performance Measures S..., Performance Measures R..., Priorities & Requirements, Pipeline, Subgrant Application & P..., Lotteries, Monitoring, Technical Assistance (highlighted), Budget, Indirect Costs, Budget Details, Implications, Review, and Signature. The top right corner shows a notification bell and a user profile labeled 'Grantee'. The main content area is titled 'Section: Technical Assistance' and 'Technical Assistance to Authorizers'. It contains the following text: 'State Entity grantees are required to use at least seven percent of grant funds for technical assistance activities related to supporting eligible applicants through the subgrant process or to supporting quality authorizing practices in the State.' Below this is a text input field with the prompt: 'Please describe the State Entity grantee's aims and objectives in providing technical assistance to authorizers.' Another text input field follows with the prompt: 'How does the State Entity grantee determine the technical assistance topics for authorizers to fund each budget period?'. A radio button question asks: 'Has the State Entity grantee conducted a needs assessment to identify technical assistance for authorizers?'. The 'Yes' option is selected. Below the question is a date input field with the placeholder 'MM/DD/YYYY' and a calendar icon.

If they click no (have not conducted a needs assessment), they are asked to describe the impact, depicted below.



Review

Signature

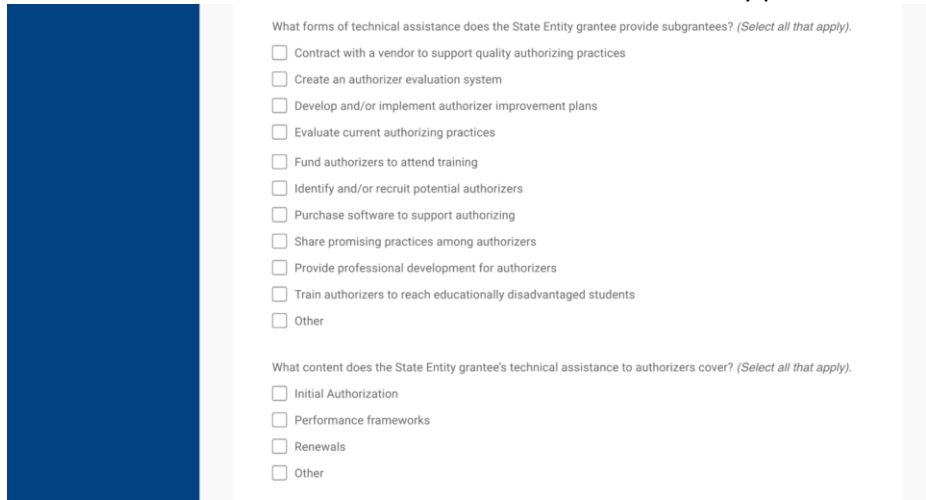
Has the State Entity grantee conducted a needs assessment to identify subgrantee technical assistance needs?

Yes

No

If No, please explain

Underneath those questions Grantees are then asked to select all forms of TA and content that they provide.



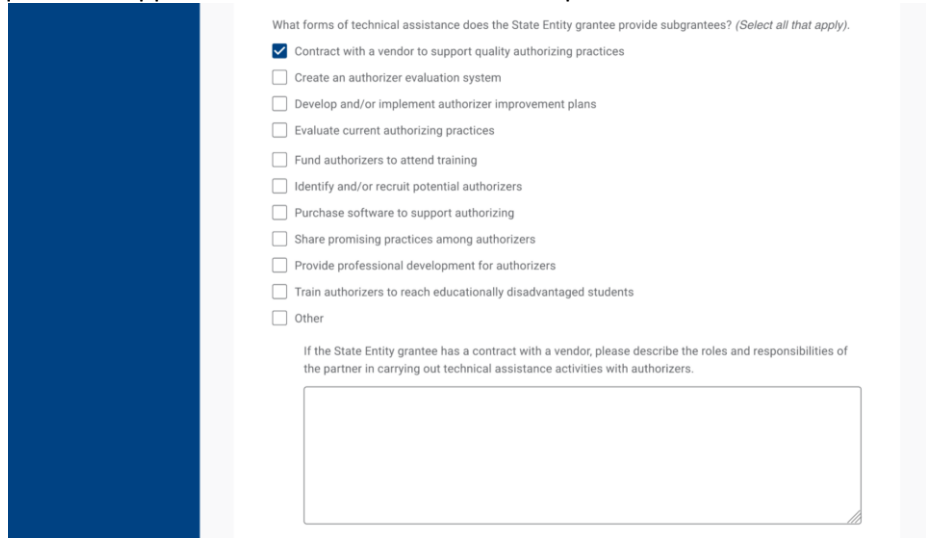
What forms of technical assistance does the State Entity grantee provide subgrantees? *(Select all that apply).*

- Contract with a vendor to support quality authorizing practices
- Create an authorizer evaluation system
- Develop and/or implement authorizer improvement plans
- Evaluate current authorizing practices
- Fund authorizers to attend training
- Identify and/or recruit potential authorizers
- Purchase software to support authorizing
- Share promising practices among authorizers
- Provide professional development for authorizers
- Train authorizers to reach educationally disadvantaged students
- Other

What content does the State Entity grantee's technical assistance to authorizers cover? *(Select all that apply).*

- Initial Authorization
- Performance frameworks
- Renewals
- Other

If Grantees select Contracts, a subsequent box appears to describe the roles and responsibilities.

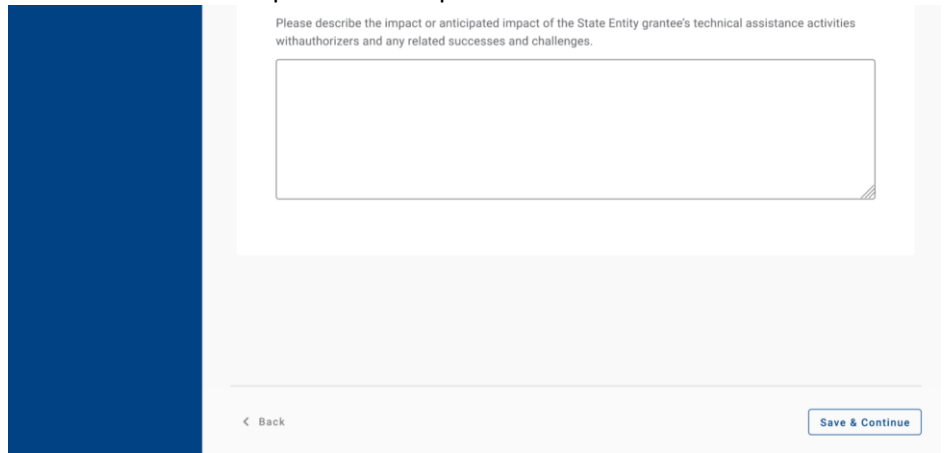


What forms of technical assistance does the State Entity grantee provide subgrantees? *(Select all that apply).*

- Contract with a vendor to support quality authorizing practices
- Create an authorizer evaluation system
- Develop and/or implement authorizer improvement plans
- Evaluate current authorizing practices
- Fund authorizers to attend training
- Identify and/or recruit potential authorizers
- Purchase software to support authorizing
- Share promising practices among authorizers
- Provide professional development for authorizers
- Train authorizers to reach educationally disadvantaged students
- Other

If the State Entity grantee has a contract with a vendor, please describe the roles and responsibilities of the partner in carrying out technical assistance activities with authorizers.

Then underneath the checkboxes Grantees are asked to input one final question.



Please describe the impact or anticipated impact of the State Entity grantee's technical assistance activities with authorizers and any related successes and challenges.

< Back Save & Continue

The image shows a screenshot of a web form. On the left is a solid blue vertical sidebar. The main content area is white. At the top of this area is a text prompt: "Please describe the impact or anticipated impact of the State Entity grantee's technical assistance activities with authorizers and any related successes and challenges." Below this prompt is a large, empty rectangular text input field with a thin border and a small cursor icon in the bottom right corner. At the bottom of the form, there is a horizontal line. Below the line, on the left, is a link with a left-pointing arrow and the text "Back". On the right, there is a button with the text "Save & Continue".

4.3.24 Budget – Indirect Costs

1. In the next section, Grantees will see the indirect costs input from their Grant Profile.
2. If they select “yes” that there have been changes to the grantee’s indirect cost information, the fields displayed to the right become editable.

If they select The Grantee is Funded, the below drop-down displays.

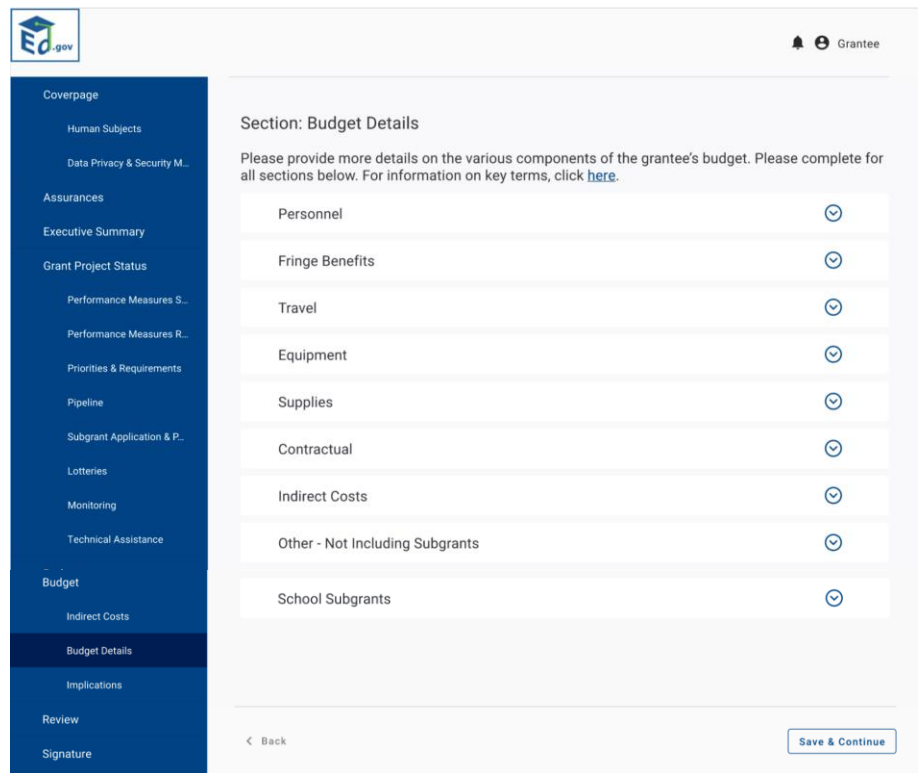
4.3.25 Budget – Budget Details

1. In the next section, Grantees will enter Budget Details for various components of a Grantee’s budget.



Budget Details

Explanation: Grantees provide updates on their incurred and anticipated costs for each reporting period in each APR and Ad-Hoc submission. The approved budget, and any carryover from the prior budget period, is pre-populated in the budget table. Grantees enter their incurred costs, anticipated costs, and expected carryover to the next budget period for all budget categories, broken down by technical assistance and administrative funds. Incurred costs for the Subgrant budget category are pulled from the School/Subgrant Data Collection module. These data help the program office track the grantees’ progress in making use of available funds.



4.3.26 Budget – Budget Details – Drop-Down

- Grantees will click each drop-down row to enter in applicable budget information and detailed explanations of their budget.

- Assurances
- Executive Summary
- Grant Project Status
- Performance Measures S...
- Performance Measures R...
- Priorities & Requirements
- Pipeline
- Subgrant Application & P...
- Lotteries
- Monitoring
- Technical Assistance
- Budget**
- Indirect Costs
- Budget Details**
- Implications
- Review
- Signature

Personnel ⌵

	Administrative	TA	Total
Carryover from Previous Budget Period (not applicable in year 1)	\$ <input type="text"/>	\$ <input type="text"/>	Auto generated
Initial Award or Non Competing Continuation's (NCC) Approved Budget (current reporting period)	\$ <input type="text"/>	\$ <input type="text"/>	Auto generated
Available Funding (MM/YYYY + MM/YYYY)	\$ <input type="text"/>	\$ <input type="text"/>	Auto generated
Spring: Incurring Costs (October 1 - February 28)	\$ <input type="text"/>	\$ <input type="text"/>	*Should be blank per submission
Amount Anticipated to be Spent - Between end of Reporting Period and end of Budget Period (Spring Only)	\$ <input type="text"/>	\$ <input type="text"/>	
Fall: Incurring Costs (October 1 - September 30)	\$ <input type="text"/>	\$ <input type="text"/>	Auto generated
Estimated Remaining: Carryover to the next Budget Period (MM/YYYY - MM/YYYY)	\$ <input type="text"/>	\$ <input type="text"/>	Auto generated

Detailed Explanation of what was expended or will be before the end of the fiscal year and how that aligns to the approved budget

Explanation of the carryover, intended use, and planned spending for the next budget year

3. For the subgrant row specifically, Grantees will fill in the information displayed to the right.

Budget	
Indirect Costs	
Budget Details	
Implications	
Review	
Signature	

School Subgrants	
	Total
Carryover from Previous Budget Period (not applicable in year 1)	\$ <input type="text"/>
Initial Award or Non Competing Continuation's (NCC) Approved Budget (current reporting period)	\$ <input type="text"/>
Available Funding (MM/YYYY + MM/YYYY)	\$ <input type="text"/>
Spring: Incurred Costs (October 1 - February 28)	\$ <input type="text"/> *Should be blank per submission
Amount Anticipated to be Spent - Between end of Reporting Period and end of Budget Period (Spring Only)	\$ <input type="text"/>
Fall: Incurred Costs (October 1 - September 30)	\$ <input type="text"/>
Estimated Remaining: Carryover to the next Budget Period (MM/YYYY - MM/YYYY)	\$ <input type="text"/>

4.3.27 Budget – Implications

- In the next section, Grantees will fill in budget implications section for the current reporting period.

Section: Budget Summary

Previous Budget Period

Total Dollars

Total Grant Expenditures \$

Current Reporting Period <RP>

Categories	Total Expenditures (Current Budget Period)	Total Expenditures (Cumulative to Date)	Percent Overall (Cumulative to Date)
Administrative	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/> %
Technical Assistance	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/> %
Subgrants	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/> %
Total	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/> %

Technical Assistance Breakdown by Activity

Technical Assistance Activity	Total Amount	Percent
Technical Assistance to subgrantees	\$ <input type="text"/>	<input type="text"/> %
Technical Assistance to charter school authorizers and to carry out other activities to improve authorizer quality, including developing capacity for and conducting fiscal oversight and auditing of charter schools.	\$ <input type="text"/>	<input type="text"/> %

REVIEW

Signature

Please explain if any percentages deviate from the statutorily defined limits: no more than 3% for administrative, at least 7% for technical assistance, and at least 90% for subgrants.

Given the grant project implementation and spending patterns described above, please describe the State Entity grantee's ability to carry out the project as proposed for the next budget period.

Explain any significant carryover anticipated for the next budget period (if applicable).

Are there any anticipated changes to the project scope for the next budget period not described elsewhere in the APR?

Yes
 No

If yes, please explain

Note: The inclusion of this information is for reporting purposes only. Any requests to modify the scope of the project will need to be submitted separately to the assigned Program Officer.

Are there any anticipated changes to the budget for the next budget period?

Yes
 No

If Grantees click Yes to the question “Are there any anticipated changes to the budget,” they will explain changes to the budget.

Are there any anticipated changes to the budget for the next budget period?

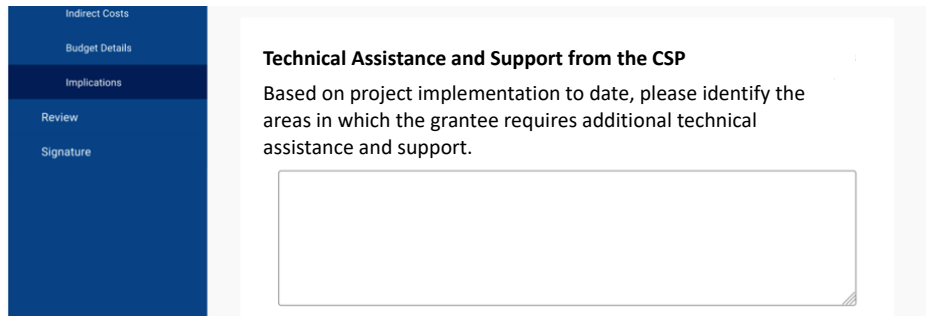
Yes
 No

If yes, please explain

Note: The inclusion of this information is for reporting purposes only. Any requests to modify the scope of the project will need to be submitted separately to the assigned Program Officer.

4.3.28 Technical Assistance and Support from CSP

1. Grantees will submit one final question about TA and support from CSP.



The screenshot shows a web form with a dark blue sidebar on the left containing a menu with the following items: Indirect Costs, Budget Details, Implications, Review, and Signature. The main content area is white and features the title "Technical Assistance and Support from the CSP" in bold. Below the title is a text prompt: "Based on project implementation to date, please identify the areas in which the grantee requires additional technical assistance and support." Underneath the text is a large, empty rectangular text input box with a thin border and a small cursor icon in the bottom right corner.

4.3.29 Review, Sign, Submit

1. Lastly, Grantees will review the information they entered and sign and submit the APR for review by ED.

The screenshot shows the Ed.gov interface for reviewing and signing an APR. On the left is a blue sidebar menu with various sections. The main content area is divided into two sections: 'Review & Submit' and 'Signature'.

Review & Submit: This section displays the current status of each APR section. A message states: "Here are the current statuses of each APR section. When you are ready, click the Submit button to send your APR out for review. Please note that APRs with sections marked Incomplete cannot be submitted." The sections listed are:

- Coverpage:**
 - Report Information: COMPLETE
 - Data Privacy & Security Measures Certification: COMPLETE
- Assurances:**
 - Form Upload: COMPLETE
- Executive Summary:**
 - Executive Summary: COMPLETE

Signature: This section contains a declaration: "To the best of my knowledge and belief, all data in this performance report are true and correct and the report fully discloses all known weaknesses concerning the accuracy, reliability, and completeness of the data." Below the declaration are four input fields: "Name of Authorized Representative", "Title", "Signature", and "Submission Date". The "Submission Date" field includes a calendar icon.

A confirmation modal with a green checkmark icon and the text: "Submitted". Below the icon, it says: "Thank you for your submission. Your Program Officer will receive your submission and get in touch with you regarding further next steps or changes. You will receive a confirmation email shortly." There is a link for "Download PDF" and a blue "OK" button.

A confirmation modal with the question: "Are you sure you want to submit?". Below the question, it states: "All changes will be made part of your APR and will be sent to your corresponding Program Officer. Once you click submit, you will not be able to make edits to your APR until your Program Officer reactivates your form. Do you wish to proceed?". At the bottom, there are two buttons: a green "YES" button and a red "NO" button.