



Onboarding Process for New Charter Schools

Office of the State Superintendent of Education: Office of Public Charter School Financing and Support

Congratulations on your decision to open a public charter school in the District of Columbia. Upon approval from the DC Public Charter School Board (PCSB) to open a public charter school, you are automatically conditionally approved to receive a Charter Schools Program (CSP) start-up grant – Title V, Part B of the Elementary and Secondary Education Act (ESEA) – from the DC Office of the State Superintendent of Education (OSSE) Office of Public Charter School Financing and Support (OPCSFS) to assist you with the planning and implementation of opening your charter school. The following information will let you know (1) what the CSP start-up grant is; (2) what you need to do in order to receive your start-up grant funds from OSSE; and (3) what you can expect in terms of monitoring and reporting after receipt of start-up grant funds.

Charter Schools Program (CSP) Start-Up Grant - Title V, Part B of ESEA

The purpose of the CSP grant is “to expand the number of high-quality charter schools available to students across the Nation by providing Federal financial assistance for charter school program design, initial implementation, and planning” (USDOE, Charter Schools Program, Title V, Part B of the ESEA, Nonregulatory Guidance, January 2014). CSP start-up grants are awards of approximately \$700,000 administered by OSSE to be used for planning and implementation in opening your charter school.

Planning

The *planning* phase will consist of the first six months of the grant period. This phase generally consists of the time period prior to the school opening. You will receive approximately \$200,000 of the total award for planning. As you may have already started the planning process, the award applies retroactively to the date which you were approved and/or conditionally approved by the PCSB. This means you may obligate costs for planning starting on your approval date. In some cases schools may defer the start of the award period to a later date. In this case, obligation of funds would start at the beginning of the award period.



During the planning process you may choose to use your funds to:

- Clarify or refine the desired educational results for your school
- Develop the tools or methods for measuring progress toward achieving those results
- Provide professional development for teachers and other staff who will work in the charter school (USDOE, Charter Schools Program, Title V, Part B of the ESEA, Nonregulatory Guidance, January 2014)

Implementation

The *implementation* phase will last six months and start six months after the award period begins. The implementation phase is the time period when your school should open and begin daily operations.

During the implementation process you may choose to use your funds to:

- Develop marketing material to inform the community about your school
- Obtain equipment and educational materials and supplies necessary for instruction
- Acquire or build curriculum materials
- Cover other initial operational costs that are not met through the use of local funds (USDOE, Charter Schools Program, Title V, Part B of the ESEA, Nonregulatory Guidance, January 2014)

Recommendations

OSSE strongly encourages applicants to set aside funds to cover costs associated with Board of Trustees training and development, the establishment of a data system compatible with the data system(s) of OSSE and PCSB, and the development and production of a fiscal management manual. Additionally, you are encouraged to use funds to address the any stipulations mandated by the PCSB with the conditional approval of your charter school. A more complete list of what you may or may not use funds for will be provided as a separate attachment.

Receiving Your CSP Start-Up Grant from OSSE

Although you have already been approved to receive your Title V, Part B funds from the OSSE based on your approval to open a charter school from the PCSB, you will need to submit the following pieces of information to OSSE before receiving your award.

- Onboarding packet including:
 - Contact information
 - Budget – Itemized budget with a brief narrative of how the funds will be used and a description of appropriateness of proposed expenditures and why each category of expenditure is necessary to support project activities and goals.



- Performance goals and fiscal management goals
- Three logic models indicating how you will achieve your performance goals. Performance goals are expected to be SMART. SMART stands for specific, measurable, achievable, reasonable, and time-bound.
- A roster of the board of trustees at your charter school.
- Copy of approval letter from the PCSB or conditional approval letter along with terms and conditions of approval.
- Tax and payment information forms:
 - W-9 – This form allows OSSE to verify your tax identification number for tax reporting purposes.
 - Automatic Clearinghouse (ACH) Payments form – This will allow OSSE to transfer payments directly to your bank account electronically
 - Master Supplier Information Collection Form – This form also helps OSSE make sure you get your payments.
- Other federal forms:
 - Disclosure of Lobbying Activity Form – SF-LLL
 - Certification Regarding Lobbying Form
 - Assurances for Non-Construction Programs – SF-424B

Initially, OSSE will issue your award letter with the amount of your award. Following receipt and approval of your budget OSSE will send your grant award notification (GAN) which provides more details on the terms and conditions of your award.

Monitoring of the CSP Start-Up Grant

As part of the conditions of receiving the award you agree to allow OSSE to periodically monitor the administration and implementation of your award. Monitoring will enable OSSE to ensure high quality implementation of the award and will help OSSE be a better adviser and partner as you open your new charter school. OSSE's monitoring of the start-up grant includes the following:

- Performance Agreement – an outline of your responsibilities as well as those of OSSE and a timeline of milestones to meet in order to accomplish the goals of the grant to be signed within 30 days of receiving your GAN.
- Collection of reports – reports consisting of performance reports, financial statement reports, and equipment and inventory logs.
- Audit Reviews – Awardees are required to provide copies of their annual financial statement audits or A-133 audits along with corrective action plans addressing audit findings.
- Desktop Monitoring – All awardees not scheduled for an on-site monitoring visit must participate in a desktop monitoring review. This review consists of submitting evidence of program administration and implementation. If the desktop monitoring review



indicates technical assistance is needed, OSSE can require additional on-site monitoring reviews.

- On-Site Monitoring – A monitoring team will conduct an on-site visit looking at indicators identified by WestEd and the United States Department of Education. On-site monitoring consists of five steps which are (1) notification, (2) pre-monitoring documentation, (3) on-site monitoring visit, (4) reported findings, and (5) close-out.

Your Partnership with OSSE

OSSE is excited to support and assist you with your charter school through the planning and implementation phase and we will continue to support and assist you afterwards. Some additional ways OSSE will continue to support you include:

- Administration of federal grants
- Providing competitive grant funding opportunities for facilities, academic programs, growth of your charter school or network, partnerships with third party education support groups, and dissemination best practices to other schools
- Providing technical assistance as you work toward your goals
- Serving as a point of contact for other OSSE services
- Working with the PCSB to ensure your needs as a charter school are met

Additional Resources

- CSP, Title V, Part B Overview - <http://www2.ed.gov/programs/charter/index.html>
- OSSE - <http://osse.dc.gov/>

