



OFFICE OF THE STATE SUPERINTENDENT OF EDUCATION



New Expense Request (NER) Form Guidance

Background

This guidance pilots a standardized process for requesting approval of new expenses under the Comprehensive Literacy State Development (CLSD) grant from the Office of the State Superintendent of Education (OSSE).

CLSD subgrantees manage multiple grants with varying federal requirements. CLSD must ensure alignment with federal rules, program pillars, and [supplement-not-supplant](#) (SNS) regulations. A standardized approach supports compliance with federal requirements for [proper documentation](#).

Purpose

The New Expense Request (NER) form provides a unified system for requesting CLSD budget changes. The form enables consistent subgrantee verification for cost allowability, SNS compliance, and program pillar alignment of proposed expenses. It also gives Program Managers a predictable and efficient review process.

When to Use the NER Form

Subgrantees must submit the NER form to request any new expense they want to add to their CLSD budget. Subgrantees must submit the NER form *before*:

- Initiating an Enterprise Grants Management System (EGMS) amendment.
- Obligating or spending funds on the proposed expense.
- The fiscal year ends.

Accessing the NER Form

- [B-5 Grade Band New Expense Request Form](#)
- [K-12 Grade Band New Expense Request Form](#)

NER Review Process

- OSSE reviews each NER form submission.
- OSSE issues a decision to the subgrantee via email within seven business days.

- If OSSE approves the new expense, the subgrantee must submit an EGMS amendment.
- If OSSE does not approve the new expense, the subgrantee cannot use CLSD funds for this expense until a new NER form is submitted and approved.
- Once the EGMS amendment is approved, subgrantees can submit a reimbursement request for the new expense once obligated and paid.

Contact Information

For questions, contact Jose Urquilla, CLSD Program Analyst, at Jose.Urquilla@dc.gov.

Appendix: Example NER Form Responses

This appendix provides optional sample responses to assist subgrantees in completing the NER Form. These examples are intended for reference only and are not part of the required submission process.

Complete Subgrantee Details Section

1. Request date

Example: 06/01/2026

2. Subgrantee name

Example: Capital City PCS

3. Name and title of subgrantee staff completing form

Example: Jose Urquilla, CLSD Program Analyst

4. Name and detailed description of the new budget expense requested

Example: New, supplemental additional funding for out of school compensation for 6-12 teachers' completion of structured literacy training "Keys to Literacy: Keys to Beginning Reading."

5. Based on K-12 CLSD pillar objectives, which pillar does this requested budget expense align with? See Attachment E of RFA ([B-5](#) or [K-12](#) grade bands)

Note: Select one from dropdown

- Pillar A: School comprehensive literacy plan creation and implementation (B-5 and K-12)
- Pillar B: Supplemental structured literacy training for educators ([K-12 only](#))
- Pillar C: High-quality, evidence-based literacy professional learning (B-5 and K-12)
- Pillar D: Supplemental literacy instructional coaching ([K-12 only](#))
- Pillar E: Family literacy training and engagement (applicable to B-5 and K-5 grade bands, optional for 6-12)

6. If you selected Pillar A/B/C (B-5) or A/B/C/D/E (K-12), which allowable cost does this expense fall under?

Note: Subgrantees will see a drop-down menu for specific allowable costs based on selected pillar

7. Explain how the requested expense connects to the pillar selected above.

Example: The "Keys to Literacy: Keys to Beginning Reading" training connects to Pillar B will build teachers' capacity to support students' literacy development. Subgrantee will ensure that competency in structured literacy is demonstrated through pre and post-tests.

8. Explain how the requested expense expands literacy resources beyond current educator capacity and/or improves literacy outcomes.

Example: Structured literacy is key to subgrantee's literacy outcomes because it ensures that all components of literacy are taught explicitly, and cumulatively. This is essential for developing literacy proficiency for all CLSD-participating students.

9. Compliance with the federal supplement not supplant provision: Is your expense required by state or local law? The supplement, not supplant provision requires that federal grant funds must add to (or supplement) and not replace (or supplant) other funds (state/local) in providing general educational services. See more information [here](#).

Using CLSD funds for an otherwise allowable CLSD activity that is required by State or local law raises a presumption of supplanting because a subgrantee must comply with the state's legal requirement with its own funds, even in the absence of federal funds.

Note: Select one from dropdown

- Yes, the expense is required by state or local law.
- No, this expense is not required by state or local law.

10. Compliance with the federal supplement not supplant provision: Has the expense been paid in prior years using non-CLSD funds? The supplement, not supplant provision requires that federal grant funds must add to (or supplement) and not replace (or supplant) other funds (state/local) in providing general educational services. See more information [here](#).

Using CLSD funds for an activity that a subgrantee provided in prior years with non-Federal funds presumes supplanting because, in the absence of CLSD funds, a subgrantee's prior decision to use non-Federal funds for the activity is a reliable predictor that the subgrantee would continue paying for the activity with non-federal funds in the current year. This presumption can be rebutted if a subgrantee can demonstrate with current evidence that it would not have continued to provide such activity with non-federal funds, due to circumstances such as a very significant budget reduction.

Note: Select one from dropdown

- Yes, this expense has been paid in previous years.
- No, this expense has not been paid in previous years.
- This expense was paid in previous years but ended prior to receiving the fiscal years 2026-2029 (FY26-29) CLSD grant. CLSD would supplement the terminated funding which would positively and

significantly impact program goals (provide required proof in next question).

11. Proof required: If the expense requested has been paid for in previous years but has ended prior to receiving a CLSD subgrant, provide an explanation with the following information: a) previous funding source; b) reason why funding ended; c) time period of previous funding for this expense.

Example: Subgrantee received funding from the Learn to Read Foundation. Total grant was \$5,000. This was a fixed-term grant for two years. Effective dates of previous grant were July 1, 2023, to June 30, 2025. Grant contract is available upon request.

Complete section 2: Expense Additional Details

12. Provide the amount requested for the new expense. What is the cost of this new expense? Provide specific dollar amounts.

Example: \$5,000

13. Provide the Enterprise Grants Management System (EGMS) budget category for the requested expense.

Note: Select one from dropdown

- Salaries and Benefits
- Professional Services
- Supplies and Materials

14. List existing expenses which would be impacted by introducing this new expense. Please also provide the existing cost of the current expense(s) that would be impacted. What other expense will be affected by this new change? How much is the existing expense? Provide specific dollar amounts. Please add the EGMS budget category of the existing expense.

Example: Subgrantee will reallocate \$5,000 from the printing materials budget line in the Supplies and Materials EGMS budget tab.

15. Provide any additional information for consideration of this new expense request. (optional)

Example: This new, supplemental training will reinforce and ensure success of Phase 3 of the subgrantee's local literacy plan.

