



Charter Schools Program (CSP) Planning & Implementation Subgrant

*Completing and Submitting the Semi-Annual
Reporting Template*

October 2021 | Stacy Kirk

Agenda

- Reporting Overview
- Reporting Timeline
- Narrative Questions
- Submission Process
- Supporting Documentation
- Reporting Template Walkthrough
- Q&A

Reporting Overview

- CSP subgrantees are required to submit narrative updates every six months.
- Deadlines are listed within the reporting template: **first report due on 11/18/21.**
- Major goals:
 - Track progress made toward subgrant SMART goals and activities.
 - Prepare for future on-site or desktop monitoring.
 - Inform OSSE of positive stories/highlights related to your charter school.
 - Share academic outcomes/impact of the CSP funding.
 - Aids in reporting to the US Department of Education (USED).
 - Reflect on challenges and successes.
 - Request technical assistance and/or training from OSSE.
 - Plan and course correct for the next six months.

Reporting Timeline

- The first reporting period begins on the first date to obligate funds.
- Each reporting period is six months.
- Reports must be submitted by email to Stacy by the stated deadline.
 - Deadline is approx. 30 calendar days after the reporting period ends.
- The final semi-annual report submission includes additional final narrative questions.
 - Deadline is approx. 45 calendar days after the reporting period ends.

Narrative Questions

- What activities were expected to be completed during the reporting period?
 - What is the status of the activity as of the last day of the reporting period?
 - What evidence demonstrates completion of the activity?
 - What factors impacted completion of this activity?
- List the number of charter school faculty, staff, students, family members, and/or board members who have benefitted from your subgrant project during this reporting period.
- Share one project highlight from this reporting period, e.g. student showcase, groundbreaking ceremony, positive shift in school culture, etc.

Narrative Questions, continued

- Describe any challenges and/or opportunities you encountered during this reporting period.
- Provide an update on how your LEA is effectively serving students with disabilities and English learners.
- Provide an update on the sustainability plan for your LEA (in the budget narrative tab of your CSP application).
- List any OSSE-sponsored technical assistance sessions attended during the reporting period and share your feedback on each.
- List any desired technical assistance or information that OSSE can provide to make your subgrant project more successful.

Final Narrative Questions

- What do you consider to be the greatest accomplishment(s) of your CSP subgrant project?
- Describe any issues that hindered the achievement of your SMART project and financial goals (from the CSP subgrant application).
- What changes, if any, would you make to your CSP subgrant project if given another opportunity?
- Describe any unanticipated benefits to your school community beyond the original goals or planned activities.
- Please share any recommendations you have for OSSE to enhance its grant making, grant application, and/or reporting procedures.

Submission Process

- Email the completed reporting template to Stacy by 5 p.m. on the stated deadline.
- Attach any supporting documentation you wish to include.
- Stacy will track submission dates and send a confirmation email.
- Stacy will review the report and follow up if technical assistance is requested or suggested.
- Missed deadlines will result in increased points on the risk matrix for the annual grants monitoring process.
- Missed deadlines may result in required submission of all supporting documentation for project activities.

Supporting Documentation

- All subgrantees must maintain expenditure documentation (payroll documentation, vendor contracts, invoices, checks, and/or receipts) for a period of five years from the end of the grant period.
- Evidence of activity completion must be maintained in preparation for future monitoring, but does not have to be submitted with each report.
 - Missing reporting deadlines and/or not fulfilling other subgrant requirements may result in required evidence submission with all semi-annual reports and/or reimbursement requests.



Reporting Template Walkthrough

Recommendations

- Have multiple members of the organization add all reporting deadlines to their calendars.
- Update the reporting template over the course of the reporting period as you achieve activities.
- Create a filing system and naming convention for supporting evidence.
 - Tip: store your evidence in folders organized by semi-annual reporting periods, as this will save you time if monitored down the road by OSSE.
- Decide on intended roles among staff members:
 - Collecting and maintaining supporting documentation
 - Drafting narrative reports
 - Reviewing draft report
 - Submitting final report



Q&A

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