



NOTE: This document provides details on what is required to apply for the Pennsylvania Charter Schools Program (PACSP) Grant. As each application window opens, a Request for Applications (RFA) announcement will be made with application due dates to the public.

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Federal Agency:	U.S. Department of Education
State Entity:	Pennsylvania Coalition of Public Charter Schools
CFDA Number:	84.282A
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Grant Information

Background and Description of the Program

Authorized by Title V, Part B, Subpart 1 of the Every Student Succeeds Act (ESSA, Public Law 114-95), which reauthorized the Elementary and Secondary Education Act of 1965 (ESEA), the federal Charter Schools Program (CSP) provides funding to State Entities (CFDA number 84.282A) to enable them to award subgrants to eligible applicants. The purpose of these subgrants is to enable eligible applicants to open and prepare for the operation of new charter schools and to replicate existing high-quality charter schools, and to expand existing high-quality charter schools. Grant funds must also be used to provide technical assistance (which includes technical assistance to eligible applicants in opening and preparing for the operation of new charter schools,) or replicating or expanding high-quality charter schools. Grant funds must be used for working with authorized public chartering agencies to improve authorizing quality including developing capacity for, and conducting, fiscal oversight and auditing of charter schools.

The Pennsylvania CSP (PACSP) Project Team is composed of individuals whose broad experience will contribute to the project's overall success. This team will be led by the [Pennsylvania Coalition of Public Charter Schools](#) (PCPCS), a 501c3 non-profit organization. The skilled and diverse management team includes representatives from [Charter Choices, Inc.](#) and many other organizations. This management team will oversee the execution of Pennsylvania's CSP project.

Purpose

In September 2020, PCPCS received a competitive grant under the federal Charter Schools Program for a five-year duration (2021-2025) in the amount of \$30,000,000. This program will enhance stakeholders' capacity to expand opportunities for students to attend excellent charter schools that meet and exceed state academic standards. Currently, thousands of Pennsylvania students annually sit on enrollment waiting lists, incapable of attending such schools due to the lack of available options. The work of PACSP Project Team will actively address this challenge.

The PACSP Project Team has two objectives to carry out within Pennsylvania:

- increasing the number of high-quality charter schools that educate substantial at-risk student populations, and
- improving student outcomes in PA charter schools, particularly for at-risk students.

At least 90 percent of the PA federal CSP award will be utilized for competitive subgrants to eligible charter school subgrantees. At least seven percent will be utilized for technical assistance activities and program evaluation/research. No more than three percent will be utilized by PCPCS for the purposes of administering the program.

Application Timeline

The Request for Application is the start date of a 45-day window to provide a letter of intent and complete the application.

During that 45-day window there will be presentations on how to complete the application and how to create a successful project budget. Virtual office hours will be held to answer any questions that may arise during the application process.

The 60 days following the application deadline will be dedicated to the Peer Review of applications and processing of award selection and announcement.

All selected subgrantees will attend a post award meeting to review expectations of recipients of subgrant awards.

Grant Details

This grant award will total \$30 million over a grant period of five years (2021-25) and will support the development, expansion and replication of 18 high-quality public schools in Pennsylvania. Each school will be a nonprofit, brick-and-mortar charter school whose model and/or track record demonstrate a strong likelihood that they will produce meaningful and sustainable student learning gains. Over the course of the grant, 90% of estimated grant funds goes directly to the subgrantees with 10% reserved for the administrative and technical assistance duties to run the grant program.

Available Funds for Subgrants

Over the life of the CSP grant period, Pennsylvania will open, expand, or replicate at least 18 schools, each of which will be a nonprofit, brick-and-mortar charter school whose model and/or track record demonstrate a strong likelihood that they will produce meaningful and sustainable student learning gains.

Award Type	Year 1	Year 2	Year 3	Year 4	Year 5	Total
	10/1/20-9/30/21	10/1/21-9/30/22	10/1/22-9/30/23	10/1/23-9/30/24	10/1/24-9/30/25	
New Charter School	1	1	1	2	2	7
Replication	1	1	1	1	1	5
Expansion	1	1	1	1	2	6
Totals	3	3	3	4	5	18

The available funds for the Year Three Request for Applications (RFA) will be divided and awarded to successful applicants as follows:

Subgrant Type	Year Three Awards	Funds Available
New Charter School	1	\$1,500,000
Replication	1	\$1,500,000
Expansion	1	\$1,500,000

Awarding structure is as follows:

- Applicant must earn at least 75% of all available points.
- The highest scoring applicant(s) per each award type may be selected.
- If no applicant in an award type has scored above 75%, then the next highest scoring applicant(s) of the entire applicant pool may be selected.

Award Sizes and Duration of Subgrants

The size of subgrant awards will be tied to specific student enrollment benchmarks aligned to the PACSP project rationale and logic model. The maximum award size for all subgrantees — regardless of whether they are opening, expanding, or replicating a school — will be \$1,500,000. However, only those applicants who educate significant numbers of students in target subgroups, both in proportional and absolute terms, will be eligible to earn the full award.

Condition	Amount	Timing
Base Award	\$900,000	20% allocated upon preliminary notice of grant award; remainder upon finalized subgrant contract
School either (a) is located in a QOZ or (b) draws at least 40% of its student population from neighboring QOZs	\$200,000	First verified enrollment count in Subgrant Year 1
At least 60% of School's students are economically disadvantaged and at least 75% of the school's students are Black or Hispanic	\$200,000	First verified enrollment count in Subgrant Year 1
School educates at least 150 economically disadvantaged students in CSP-funded grades	\$200,000	First verified enrollment count in Subgrant Year 2

Use of Funds

The CSP grant is funded on a **reimbursement basis**, which means that subgrantees will be reimbursed for allowable, approved activities following proof of expenditure. The school project budget template and budget narrative will be reviewed for non-allowable expenditures and reasonableness of cost assumptions.

An applicant receiving a subgrant under this program may use the subgrant funds only for uses as defined in the ESSA Section 4303(h):

1. Preparing teachers, school leaders, and specialized instructional support personnel, including through paying the costs associated with—
 - a. providing professional development; and
 - b. hiring and compensating, during the eligible applicant's planning period specified in the application for subgrant funds that is required under this section, one or more of the following:
 - i. Teachers.
 - ii. School leaders.
 - iii. Specialized instructional support personnel.
2. Acquiring supplies, training, equipment (including technology), and educational materials (including developing and acquiring instructional materials).
3. Carrying out necessary renovations to ensure that a new school building complies with applicable statutes and regulations, and minor facilities repairs (excluding construction).
4. Providing one-time, startup costs associated with providing transportation to students to and from the charter school.
5. Carrying out community engagement activities, which may include paying the cost of student and staff recruitment.
6. Providing for other appropriate, non-sustained costs related to the activities described in subsection (b)(1) when such costs cannot be met from other sources.

Eligible Applicants

Eligible applicants must have an approved charter school application from a Pennsylvania authorizer in order to apply for Federal CSP dollars under this program. PACSP cannot fund applicants through the charter application process prior to approval. Grant applicants must conform to the federal definition of a public charter school in the Elementary and Secondary Education Act [P.L. 114-95, section 4310(2)] to be eligible for grant funds under the CSP.

PACSP will follow the federal definition of high-quality charter schools, defined as schools that:

- show evidence of strong academic results which may include strong student academic growth as determined by the state;
- have no significant issues in the area of student safety, financial and operational management, or statutory or regulatory compliance;
- have demonstrated success in significantly increasing student academic achievement, including graduation rates where applicable, for all students served by the charter school; and
- have demonstrated success in increasing student academic achievement, including graduation rates where applicable, for each of the subgroups of students, as defined in

section 1111(c)(2) of the ESSA, except that such demonstration is not required in a case in which the number of students in a group is insufficient to yield statistically reliable information or the results would reveal personally identifiable information about an individual student.

Applicants cannot receive a subgrant for expansion of a school funded under the CSP grant for a five-year period, unless the applicant demonstrates that the charter school has at least three years of improved educational results for students enrolled in the charter school and meets the high-quality definition components ESSA SEC. 4310 (8) A and D. Expansions grant cannot be for the same activities funded under a previous CSP grant.

Expanding or Replicating Schools

Those who wish to expand or replicate existing charter schools must meet the ESSA SEC. 4310 (7-9) definitions for “expansion”, “replication” and “high quality” as listed below. Schools that do satisfy the criteria of the definition list below are not eligible for subgrant funding.

Definitions

2. **Charter school.** A charter school is a public school that—
 - a. In accordance with a specific State statute authorizing the granting of charters to schools, is exempt from significant State or local rules that inhibit the flexible operation and management of public schools, but not from any rules relating to the other requirements of this paragraph;
 - b. Is created by a developer as a public school, or is adapted by a developer from an existing public school, and is operated under public supervision and direction;
 - c. Operates in pursuit of a specific set of educational objectives determined by the school’s developer and agreed to by the authorized public chartering agency;
 - d. Provides a program of elementary or secondary education, or both;
 - e. Is nonsectarian in its programs, admissions policies, employment practices, and all other operations, and is not affiliated with a sectarian school or religious institution;
 - f. Does not charge tuition;
 - g. Complies with the Age Discrimination Act of 1975, Title VI of the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, section 504 of the Rehabilitation Act of 1973, the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 et seq.), section 444 of the General Education Provisions Act (20 U.S.C. 1232g) (commonly referred to as the “Family Educational Rights and Privacy Act of 1974”), and part B of the Individuals with Disabilities Education Act;
 - h. Is a school to which parents choose to send their children, and that:
 - i. Admits students on the basis of a lottery, consistent with section 4303(c)(3)(A), if more students apply for admission than can be accommodated; or
 - ii. In the case of a school that has an affiliated charter school (such as a school that is part of the same network of schools), automatically enrolls students who are enrolled in the immediate prior grade level of the affiliated charter school and, for any additional student openings or student openings created through regular attrition in student enrollment in

- the affiliated charter school and the enrolling school, admits students on the basis of a lottery as described in clause (i);
- i. Agrees to comply with the same Federal and State audit requirements as do other elementary schools and secondary schools in the State, unless such State audit requirements are waived by the State;
 - j. Meets all applicable Federal, State, and local health and safety requirements;
 - k. Operates in accordance with State law;
 - l. Has a written performance contract with the authorized public chartering agency in the State that includes a description of how student performance will be measured in charter schools pursuant to State assessments that are required of other schools and pursuant to any other assessments mutually agreeable to the authorized public chartering agency and the charter school; and
 - m. May serve students in early childhood education programs or postsecondary students.
5. **Developer.** An individual or group of individuals (including a public or private nonprofit organization), which may include teachers, administrators, and other school staff, parents, or other members of the local community in which a charter school project will be carried out.
 7. **Expansion.** The term “expand”, when used with respect to a high-quality charter school, means to significantly increase enrollment or adding one or more grades to the high-quality charter school.
 8. **High-quality (federal definition).** The term “high-quality charter school” means a charter school that:
 - a. Shows evidence of strong academic results, which may include strong student academic growth, as determined by a State;
 - b. Has no significant issues in the areas of student safety, financial and operational management, or statutory or regulatory compliance;
 - c. Has demonstrated success in significantly increasing student academic achievement, including graduation rates where applicable, for all students served by the charter school; and
 - d. Has demonstrated success in increasing student academic achievement, including graduation rates where applicable, for each of the subgroups of students, as defined in section 1111(c)(2), except that such demonstration is not required in a case in which the number of students in a group is insufficient to yield statistically reliable information or the results would reveal personally identifiable information about an individual student.
 9. **Replication.** The term “replicate,” when used with response to a high-quality charter school means to open a new charter school, or a new campus of a high-quality charter school, based on the educational model of an existing high-quality charter school, under an existing charter or an additional charter, if permitted or required by State law.

Regulations and Guidance

- Applicants should be aware of the following relevant provisions:
 - January 2014 CSP Nonregulatory Guidance and 2 CFR Part 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards and Non-Regulatory Guidance Student Support and Academic Achievement Programs.

- Applicants should also be aware of the following federal regulations and guidance that impact this federal CSP subgrant:
 - Education Department General Administrative Regulations (EDGAR), 34 CFR parts 75, 76, 77, 79, 81, 82, 84, 97, 98, and 99.
 - The Office of Management and Budget Guidelines for Agencies on Governmentwide Debarment and Suspension (Non-procurement) in 2 CFR part 1801 as adopted and amended as regulations of the U.S. Department of Education in 2 CFR part 3485.
 - Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR 200), as adopted and amended in 2 CFR part 3474.
 - Uniform Guidance Technical Assistance for Grantees (Uniform Guidance TA), ESSA Flexibility Frequently Asked Questions (FAQ) (December 2017) PDF (190 KB).
 - ESSA Flexibility Webinar Recording and Slides.
 - Charter Schools Program Nonregulatory Guidance (updated January 2014) MS Word (203 KB).
 - CSP Guidance on the Use of Funds to Support Preschool Education (December 2014) MS Word (45KB).
- Applicants should also be aware of other programmatic guidance identified on the federal Charter Schools Program website.

Lottery and Enrollment Requirements

A charter school receiving CSP funds must have a lottery policy in effect that will be used if more students apply for admission to the charter school than can be admitted. A lottery is a random selection process by which applicants are admitted to the charter school, as per ESEA § 4303 (c)(3)(A). While a charter school with fewer applicants than spaces available does not need to conduct a lottery, it is important that schools are prepared for when there is the demand that leads to oversubscription by having a clearly defined lottery policy throughout the duration of the subgrant.

A charter school that is oversubscribed and, consequently, must use a lottery, generally must include in that lottery all eligible applicants for admission. A charter school may exempt from the lottery only those students who are deemed to have been admitted to the charter school already and, therefore, do not need to reapply.

Specifically, the following categories of applicants may be exempted from a lottery based on one of the following bases:

1. Students who are enrolled in public school at the time it is converted into a public charter school;
2. Students who are eligible to attend, and are living in the attendance area of, a public school at the time it is converted into a public charter school;
3. Siblings of students already admitted to or attending the same charter school;
4. Children of a charter school's founders, teachers, and staff (so long as the total number of students allowed under this exemption constitutes only a small percentage of the school's total enrollment); and

5. Children of employees in a work-site charter school, (so long as the total number of students allowed under this exemption constitutes only a small percentage of the school's total enrollment).

When recruiting students, charter schools should target all segments of the parent community. ESEA § 4303 (f)(1)(A)(viii)(I) requires charter school grant and subgrant recipients to inform students in the community about the charter school and to give each student “an equal opportunity to attend the charter school.” Thus, a charter school must thus recruit in a manner that does not discriminate against students of a particular race, color, national origin (including English language learners), religion, sex, or those with disabilities. To meet this goal, charter schools should consider additional recruitment efforts toward groups that might otherwise have limited opportunities to participate in the charter school's programs.

Charter schools should reach out broadly to the community, including to English language learners and students with disabilities. Once a student has been admitted to the charter school through an appropriate process, he or she may remain in attendance through subsequent grades. A new applicant for admission to the charter school, however, would be subject to the lottery if, as of the application closing dates, the total number of applicants exceeds the number of spaces available at the charter school. ESEA § 4303 (f)(1)(A)(viii)(I).

To be eligible for a CSP subgrant, a charter school's admission practices must comply with applicable federal and state laws. Exemptions from the lottery specified above are permissible only to the extent that they are consistent with Pennsylvania's charter school law, other applicable State laws, the school's charter, and any applicable Title VI desegregation plans or court orders requiring desegregation. A charter school's admissions practices must also comply with Part B of the Individuals with Disabilities Education Act and Federal Civil Rights laws, including, but not limited to Title VI of the Civil Rights Act of 1964; section 504 of the Rehabilitation Act of 1973; and Title II of the Americans with Disabilities Act of 1990, as applicable.

Enrollment Policy

The following elements must be addressed in the charter school's enrollment policy/report that will be submitted as an attachment to the grant application.

- How the community was/will be notified of the charter school's opening.
- The date of the first, and thereafter annual, lottery.
- The charter school's definition of founding family and the percentage of students to be enrolled as children of founding families.
- The charter school's definition of staff and the percentage of students to be enrolled as children of staff members.
- The processes and procedures that will guide how the lottery will be conducted; and
- Which students will be given priority notice or guaranteed admission.

Applicants must have a policy or plan targeting all segments of the parent community when recruiting students and must recruit in a manner that does not discriminate against students of a particular race, color, national origin (including English learners), religion, or sex, or against students with disabilities.

Requirements of Subgrantees

Risk Assessment

Under all federal programs, it is required to assess subgrantees and their applications to identify potential fiscal and programmatic risks, which may result in increased reporting, monitoring, additional technical assistance, corrective action, and/or grant suspension or termination. This includes assessing the performance of Education Service Providers (ESPs), Education Management Organizations (EMOs), and Charter Management Organizations (CMOs) as it relates to subgrantees' successful operations.

Award amounts may be reduced if subgrantees do not adhere to the terms of their grant. This reduction in award amounts may include situations where:

- projected enrollment is not met,
- technical assistance requirements are not completed each year,
- funds are not spent in a timely manner, and/or
- required reporting is not completed.

In order for schools to exit the program in good standing, it is imperative that subgrantees comply with all requirements of the program.

Participation

The federal CSP Subgrant is available to charter schools that have an approved charter agreement with a state sanctioned public charter school authorizer; and are able to:

- demonstrate eligibility
- participate in regular required technical assistance
- budget funds according to federal guidelines
- comply with reporting requirements, due dates and reviews

Participation is an inherent expectation and required in return for funding. Subgrantees are expected to meet technical assistance, evaluation, and reporting participation requirements. Application indicates acknowledgement and consent to these contingencies.

Evaluation

PACSP will ensure that each eligible applicant that receives a subgrant under PACSP's grant will implement with fidelity the activities described in the subgrantee's application, and to ensure that they adhere to federal rules and regulations and accomplish their performance goals. This monitoring system reviews charter schools each year.

- Up to 18-month Planning Phase - a desk review is conducted at the end of the planning phase to ensure that there is a signed contract and any necessary waivers on file, technical assistance is completed, grant award spending is timely, and an Annual Financial Report (AFR) has been submitted.
- Year 1 and Year 2 Implementation - a site visit is conducted by grant program staff and outside experts as needed to review a list of indicators to identify progress toward grant objectives, spending according to budget, educational programming, enrollment

procedures, receipt of other federal funds and compliance to various other requirements, including fulfillment of TA, review of certifications, and submission of the AFR. This comprehensive review looks at academic performance, learning environment, organizational effectiveness, governance, and quality leadership through a variety of lenses. The school is provided with a final written report that includes suggestions for both short- and long-term school improvements.

Schools that fail to adhere to subgrantee RFP and/or federal guidelines or to demonstrate high academic achievement will be subject to corrective action and placed on high-risk status until concerns are resolved.

Monitoring

PACSP will utilize the risk assessment to determine the depth and breadth of monitoring required for specific subgrantees. Subgrantees are expected to participate in all technical assistance, monitoring, and reporting elements as a condition of receiving the funds.

Subgrantees shall submit documentation of progress toward meeting specific goals and objectives listed within the grant through the annual performance report. Additionally, personnel or staff funded through the grant will be compensated monthly through a reimbursement process, and an annual financial expenditure report shall be submitted. PACSP staff shall audit financial records to ensure appropriate evidence of expenditures and record keeping.

Subgrantees that do not receive satisfactory reports and fail to address corrective actions shall be considered for non-renewal of further awards and may be subject to further sanctions.

Technical Assistance

PACSP is committed to ensuring that all prospective applicants receive adequate technical assistance to submit a high-quality proposal. Once the subgrants are awarded, awardees will be required to participate in a variety of technical assistance activities (e.g., workshops, webinars, coaching, etc.) over the grant period that are designed specifically to improve each school's likelihood of success in achieving its mission.

PACSP will post notification of this funding opportunity, along with all information regarding technical assistance training, tools and resources relevant to the subgrant application on its partner organizations' websites – the Pennsylvania Coalition of Public Charter Schools and Charter Choices. The project team will ensure that all notifications are disseminated directly and timely via email to district authorizers, charter school developers, and charter support networks. Further, the project team will also conduct an annual workshop to announce the CSP grant, explain the application process, and address prospective applicants' questions (see important dates above). These CSP outreach efforts build upon the current work of PCPCS that includes:

- **New Charter Applicant Guidance.** Although Pennsylvania's Department of Education provides statutory and administrative guidance regarding the required contents of a charter application (applicants often request additional coaching and support regarding the scope and nature of information their charters should include. PCPCS has developed an annual workshop to address this need: "[Charter School Fundamentals: How to Start a Quality Charter School](#)". This seminar is designed to ensure that

applicants design high-quality school models and maximize their chances of approval. It provides interactive project management tools, resources, and advice on topics ranging from employee recruitment to governance training. Facilitators will dive into the legal and operational particulars – finances and budgets, building issues and permits, technology costs and reimbursement, while providing regular opportunities for individualized coaching and strategizing.

- **Annual Conference & Regional Training Events.** PCPCS – in concert with its PACSP partner organizations – presents an Annual Conference in Harrisburg (along with regional gatherings) that provide new school leaders and operators with an opportunity to learn from and network with experienced, high-quality charter school professionals. The conference offers a range of research-based, best-in-class learning strands from which participants may choose, including Instructional Innovation, School Finance & Strategy, Governance, Best Practices in Authorization, and Operations & Administration.

Further, the Pennsylvania Department of Education (PDE), in partnership with Research for Action, provides an [“Equity Focused Charter School Authorizing Toolkit”](#). This resource includes customized tools and examples of best practices from around the country intended to support Pennsylvania’s school district authorizers in collaborating with charter schools to promote equitable access.

In addition to existing state-sponsored trainings and technical assistance to be provided by PACSP’s Project Team, multiple providers will coordinate ongoing technical assistance trainings throughout the year for subgrantees and authorizers to address issues specific to the Federal CSP Grant and best practices for effective charter schools. Topics may include:

- School Governance,
- Human Capital,
- Instructional Improvement,
- Finance & Strategy,
- Management & Leadership, and
- Maximizing the Authorizer’s Role.

In addition to these ongoing workshops (both online and in-person), all subgrantees will receive an onsite technical assistance and monitoring visit within the first 12 months of school operation to ensure that activities occur as approved within the grant. Further, PACSP team will use the opportunity to gather information regarding future technical assistance. Additionally, prior to each subsequent fiscal year, the subgrantee will submit an annual progress report to PACSP delineating its progress relative to its performance agreement, and if necessary, will explain adjustments to its plans to ensure that all outcomes and goals are met.

To ensure the protection and appropriate use of federal dollars, failure to demonstrate progress towards these mutually-agreed upon benchmarks and targets may result in cancellation of the grant and the return of misused or unspent funds. For those subgrantee schools failing to meet expected benchmarks and targets, PACSP, in cooperation and coordination with the authorizing agency, will provide technical assistance to support school improvement efforts. PACSP staff will provide ongoing technical assistance for all subgrantees by phone, email, and in-person meetings to ensure compliance to the goals of this grant, and to ensure all appropriate accountability and reporting requirements are met. If further opportunities are needed, then

subgrantees and prospective subgrantees may email the PACSP Technical Assistance Lead at pacspgrant@pacharters.org to set up an appointment to discuss.

Reporting

PACSP is required to track specific information as a part of its federal CSP grant. Subgrantees will be required to:

- Join PACSP's mailing list. Multiple people from each school are encouraged to be on this list.
- Maintain a performance contract with PACSP - separate from, but aligned with, an authorizer's performance certificate - that will be based on data and reporting currently provided by the state accountability system under ESSA requirements to ensure progress is being made towards achievement goals, performance benchmarks, accreditation, and compliance reporting requirements. Subgrantees agree to participate in all required reporting associated with the performance certificate for both years of their grant and a third year to better track overall effectiveness of the CSP program.
- Provide contact information for current board members, with officers identified, including a phone number and e-mail address for each board member.
- Notify the PACSP Project Team upon any transition of administrator, leadership, or board at the school during the full two-year grant cycle. Note: Additional technical assistance may be required. A changeover in school grant contact will require the governing board to submit a written notification and the new school grant contact will be required to complete the PACSP Grant Post-Award Webinar within five business days.
- Provide information requested via survey and other data collection projects.
- Financial reporting: An AFR is required to be filed within 90 days following each grant fiscal year. The AFR reports actual expenditures made from the grant. If an AFR is not filed, subgrantees risk losing their funds for the following year.
- Final grant report: A final grant report is due to PACSP within 90 days of the end of the final grant year. The final report should contain the following.
 - Executive summary (not to exceed one page);
 - Report on each grant project goal, including a summary of the progress made on each goal and objective;
 - A report on the academic achievement and growth of the school, including a copy of the school's most recent school performance framework report;
 - Financial narrative report on how the grant was expended for each of the grant years and totals for the two-year period; and
 - Expenditure report that details 100 percent of awarded grant funds and includes a property inventory of all equipment and non-consumable goods purchased with CSP grant funds (EDGAR §80.32, §74.34).

Note: Completion of all PACSP project requirements are necessary in order to exit the program in good standing.

Change of status: Should the charter school change to non-charter status within 10 years of receiving a subgrant, grant funds must be reimbursed to PACSP. An exception may be made for schools that convert status due to either federal or state law requirements for academic purposes.

Data Privacy

PACSP takes seriously its obligation to protect the privacy of student Personally Identifiable Information (PII) collected, used, shared, and stored. PII will not be collected through the PACSP project. All program evaluation data will be collected in the aggregate and will be used, shared and stored in compliance with state and federal law and PCPCS' privacy and security policies and procedures.

Review, Award, and Submission Processes

Review Process

To ensure subgrants are awarded to the most capable applicants, each proposal for a CSP subgrant will be reviewed by an external Peer Review Team (PRT) selected through an application process. To ensure a diverse collection of impartial reviewers who are intimately familiar with the Commonwealth's educational and political landscape and who are well-positioned to assess whether a school will contribute to the advancement of the CSP project's objectives, the PRT will consist of five primary members and two alternate members from the following categories:

- A disinterested member of the PCPCS board;
- A successful charter school founder;
- An expert in charter school business management and finance;
- A representative from a Pennsylvania institution of higher education; and
- A member of the PCPCS Legal Advisory Council.

Peer reviewers will be required to self-report any conflicts of interest at the time of request for qualifications (RFQ) submission and at the time of CSP application review. Peer reviewers shall not participate in any actions or decisions that directly or indirectly involve their own financial interests or those of their families or business associates. If potential reviewers are directly or indirectly affiliated with a grant applicant through themselves, a family member or business interest, the individual will not be allowed to score applications where the conflict of interest exists and the application will be assigned for review by an alternate member of the PRT team.

These reviewers will receive training on the effective use of a Selection Criteria Rubric to rate potential subgrant proposals. Using criteria listed within the Selection Criteria Rubric included in this RFA, the team will review each application and assign a score. Applicants will then be ranked according to score. The CSP subgrant is competitive; therefore, high scores from peer reviews increase an application's likelihood of approval and receipt of funding.

The subgrant application will consist of four distinct sections in which schools may earn points. The table as follows provides the relevant scoring rubrics and the weights accorded to each section. To be eligible to receive a subgrant, an applicant must earn at least 75 percent of all available points. The highest scoring applicant(s) per each award type may be selected. If no applicant in an award type has scored above 75%, then the next highest scoring applicant(s) of the entire applicant pool may be selected.

Application Section	Scoring Rubric	Weighting (Expansion/ Replication Applications)	Weighting (New School Applications)
School Model (Qualitative)	PCPCS Quality Standards Four Point Scale	35%	50%
Track Record (Quantitative)	School District of Philadelphia Academic, Organization, and Financial Metrics Three Point Scale	35%	N/A
PACSP Project Specific Narratives	Custom PACSP Scoring Rubric Four Point Scale	15%	25%
Competitive Preference Priorities	Custom PACSP Scoring Rubric Four Point Scale	15%	25%

Award Process and Start Date

Applicants and their authorizer will receive notification on the status of their application via email. If approved for funding, the subgrant award letter will stipulate any additional information that is required within 30 days before final approval will be granted, including necessary budget modification.

Successful subgrantees will be required to participate in a CSP Subgrant Post-Award Webinar. Once conditions of a CSP subgrant award are met, the applicant will receive an email stating the subgrantee has final approval. Funds should not be spent or encumbered until the grant has received final approval, unless otherwise directed in writing.

The PACSP team is mindful that schools awarded may require differing planning periods (PACSP can only fund up to 18 months of planning) based upon when the students will be starting at the new charter school, expansion, or replication. Please see the example below for further details.

*School A is opening, expanding, or replicating with new students starting Fall of 2022.
School B is opening, expanding, or replicating with new students starting Fall of 2023.*

Both schools will begin their first program year on October 1, 2022. School A will go directly into their implementation period, while School B will begin their planning period. Each school will be provided a 90-day look back period for eligible expenses prior to October 1, 2022.

Submission Process and Deadline

PACSP subgrant funds are distributed using one process. A charter school may submit only ONE application using PACSP's subcontracted online portal.

Please note the CSP subgrant application deadline is due at 11:59 PM EST on the due date. Applications submitted late or incomplete will not be considered. PACSP is required to enforce the established deadline to ensure fairness to all applicants. We suggest you submit your application and upload supporting documentation several days before the deadline to ensure it is received and complete, we strongly recommend that you do not wait until the last day to submit your application or upload documents.

Submit the electronic copy of the entire application electronically by 11:59 PM EST on the due date via PACSP's online application portal. Contact pacspgrant@pacharters.org with any online portal issues.

Incomplete or late applications will not be considered. Please email pacspgrant@pacharters.org if you would like to receive email confirmation of receipt of your application.

Original copies of the signed Certifications and Assurances document must be postmarked (via mail) on the business day following the due date to: **Charter Choices, ATTN: PACSP Grant, 222 N Keswick Avenue Glenside, PA 19038.**

Grant Application Instructions

After creating an online profile in PACSP's online application portal, there will be a list of tasks and supporting documents in addition to the application with project narrative. PACSP will provide technical assistance to applicants. Please email pacspgrant@pacharters.org for additional details and/or with any questions or comments.

Important notes for applications:

- All pages must be standard letter size (8.5" x 11").
- Use 11-point font in Calibri or Time New Roman font, double line spacing, and one-inch margins. Tables may be in an 11-point font.
- Number all pages.
- Executive summary should not exceed one page double spaced.
- Application Narrative should not exceed thirty pages double spaced.
- Project Specific Narrative should not exceed two pages double spaced.
- Competitive Preference Priority Plan should not exceed two pages double spaced.
- Budget Narrative should not exceed three pages double spaced.
- School Project Budget spreadsheet must be submitted in Microsoft Excel format.

Complete applications will include the following:

- A completed letter of intent (see below) must be submitted via the online portal within 15 days of the application window opening
- The following documents must be completed/submitted via the online portal by deadline at 11:59 PM EST.
 - Cover Sheet and Enrollment Information
 - Authorizer Notification
 - Executive Summary
 - Application Narrative
 - Project Specific Narrative and Required Attachments
 - Competitive Preference Priority Plan
 - Budget Narrative
 - School Project Budget Template
 - Required Attachments
- An original copy of the signed Certifications and Assurances must be postmarked (via mail) on the business day following the deadline to: **Charter Choices, ATTN: PACSP Grant, 222 N Keswick Avenue Glenside, PA 19038.**
- Additional documents are required for replication or expansion schools. Details can be found on page 40 of this RFA under the section titled: Track Record (Expanding or Replicating Schools Only). Not to exceed ten pages double spaced.

Please Note: Do not attach curriculum, invoices, or any other document not specifically required as an attachment. If the applicant wishes to include additional attachments, please email pacspgrant@pacharters.org with your request for permission and a supporting rationale. Without proper authorization from PACSP, extraneous attachments will be removed and not submitted to the PRT.

Grant Budget Instructions

There are two components of the budget: the Budget Narrative and the School Project Budget Template.

The applicant must prepare a budget detailing expenditure for each year of the three-year project of their grant request. The applicant may utilize up to 18 months of the grant award for planning activities.

Each year's budget must not exceed the award totals shown in the table below. Please email pacspgrant@pacharters.org for all budget and finance questions.

Grant Year	Year 1 10/1/2022 to 9/30/2023	Year 2 10/1/2023 to 9/30/2024	Year 3 10/1/2024 to 9/30/2025	Total Award
Awardees	\$1,100,000	\$200,000	\$200,000	\$1,500,000

Format and Content

The School Project Budget Template is attached. Applicants are required to use the provided template. The budget must be submitted in Microsoft Excel format. Please note the following recommendations and guidelines when completing the budget narrative and template:

- Write the Budget Narrative – this is where you explain how the funds will be used to meet the project goals. There should be a section on expected planning activities (and length of planning activities not to exceed 18 months) and section on implementation activities.
- Applicants must fully complete all tabs in the School Project Budget Template.
- Provide a breakdown and justification for each line item.
- Remember that you may be asked to revise and submit the budget several times before final approval.
- Requests for professional development for board and/or staff must include the type of training, expected attendees, expected outcomes, topic(s), provider, location of training (out-of-state training may not be given final approval), and a plan for sustaining that training.
- Allowable salaries and benefits are limited to activities that are startup in nature and not day to day operations; required information includes name, title, a list of activities funded by the grant, percentage of time per week and length of time grant funding will be used to cover the salary.
- Time and Effort documentation is required for all school or contract personnel compensated with federal funds (OMB A87 Attachment B(8)(h)).
- CSP funds must supplement, not supplant, existing services and may not be used to supplant federal, state, local, or non-federal funds.

The Budget Narrative should not exceed three pages, double spaced. The purpose of the Budget Narrative is to assist grant reviewers in understanding how your budget supports your grant application. There should be a clear connection between the objectives identified in your grant application and the grant request. This narrative must clearly explain that all expenditures are allowable, reasonable, and allocable; are adequate to support the activities of the project; and directly connect to the goals and objectives in the proposal narrative. It is important that the budget and narrative demonstrate how the school will maintain financial sustainability after the end of the subgrant period. The Budget Narrative is the justification of 'how' and/or 'why' a line item in the budget summary helps to meet the program deliverables. The Budget Narrative must discuss all years of funding that align to the CSP grant budget.

Guidelines and Restrictions

As a general matter, an expenditure that is not specifically authorized by statute must be necessary, reasonable, and allowable to the grant in order to be allowable under the CSP (2 CFR 200.403 (a)). In particular, recipient schools should refer to the following provisions:

- **Reasonable cost:** A cost is reasonable if, in its nature and amount, it does not exceed that which would be incurred by a prudent person under the circumstances prevailing at the time the decision was made to incur the cost. In determining reasonableness of a

given costs, consideration must be given to, among other things, whether the cost is of a type generally recognized as ordinary and necessary for the operation of the non-federal entity or the proper and efficient performance of the Federal award, and market prices for comparable goods or services for the geographic area. (2 CFR 200.404).

- **Allowable cost:** A cost is allowable if the goods and services involved are chargeable or assignable to the grant in accordance with the relative benefits received. (2 CFR 200.405(a)).
- Be authorized and not prohibited under state or local laws or regulations.
- Be consistent with policies, regulations, and procedures that apply uniformly to both federal awards and other activities of the recipient school.
- Except as otherwise provided for in the federal circular, be determined in accordance with generally accepted accounting principles.
- Not included as a cost or used to meet cost sharing or matching requirements of any other federal award in either the current or a prior period. Be net of all applicable credits.
- Be adequately documented.

Allowable Costs

Applicant should also refer to Use of Funds on page 6 of this RFA and [PACSP Allowable Cost Guide](#).

Fundable activities are limited to those identified in ESSA Section 4303(h), with what is allowable under [2 CFR Part 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards](#).

As a general matter, the following are examples of costs that may be included, but are not necessarily limited to:

- Personnel expenses, including fringe benefits, incurred either before or after the school's opening, provided that these expenses are associated with initial implementation activities (i.e., as opposed to ongoing operations), such as program and curriculum development and integration, and teacher and staff recruiting. Further, personnel expenses after the school's open can be allowable only when the costs cannot be met by other sources.
- Professional development activities related to the school opening or expansion (as opposed to regular, ongoing professional development) including staff training, instruction and curriculum development, and organizational development.
- Travel costs for school leaders, staff, and school board to attend conferences and training, including visits to other charter schools. (Note: Out-of-state travel is unallowable unless it can be demonstrated that the goal of the travel is directly related to the startup activity and cannot be accomplished in-state. No out-of-country travel is permitted.)
- Costs associated with creating and implementing office functions, such as accounting systems, attendance and registration systems, and human resource policies.
- Costs associated with the installation of computers, data systems, networks, and telephones.
- Instructional, staff and administrative computer hardware and software, computer lab equipment, and other instructional equipment.

- Furniture and fixtures, classroom equipment, lab equipment, school library/media center equipment.
- Textbooks, curriculum, library/classroom books, and reference materials (includes electronic media).
- Playground structures and equipment.
- Rental or occupancy costs for the school facility for a reasonable period of time in preparation for the school's opening.
- Communications and promotional materials.
- Outreach and recruitment.
- Mortgage, rent, or lease payment for school facility PRIOR to the start date of school for a reasonable period of time in preparation for the school's opening.

This is not a comprehensive list of allowable items. Applicants may request other items as long as they are appropriately categorized and itemized, conform with the General Budget Guidelines and Restrictions, and are not specifically disallowed.

Unallowable Costs

The following list is not inclusive but is presented to show typical items that cannot be covered with grant funds:

- Purchase or leasing of a facility.
- Lobbying.
- Utilities and other facility operating expenses on or after the first day of school.
- Salaries or related fringe benefits after the school opens for essential staff.
- To offset or cover the costs of preparing and applying for CSP grant funds.
- Facility construction, renovation or other capital improvement costs, except as described above.
- Professional dues or memberships.
- Employee hiring/recruitment expenses such as a placement firm or travel for prospective employees.
- Non-educational/non-informative promotional/novelty items for advertising, events, or recruiting.
- Gift certificates, alcoholic beverages, school apparel for staff or students, and fines and penalties.
- Food for meetings or any other purposes.
- Out-of-state travel unless it can be demonstrated that the goal of the travel is directly related to startup activity and cannot be accomplished in-state (no out-of-country travel is permitted).

References and Additional Guidance

- Additional information and guidance on budgeting, budget revision, and allowable expenses will be provided during technical assistance meetings, calls, and site visits.
- Additionally, utilize the supporting when [PACSP Allowable Cost Guide](#) when determining allowable versus unallowable expenditures for applicant's proposed budget.
- Applicants should also be aware of the following relevant provisions 2 CFR Part 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for

Federal Awards and Nonregulatory Guidance Student Support and Academic Achievement Programs.

- Applicants should be aware that if you spend over \$750,000 of Federal funds in one fiscal year, you will be required to hire a CPA firm to complete a “Single Audit” of your Federal funds. For more reference on Single Audit requirements, please see <https://www.councilofnonprofits.org/nonprofit-audit-guide/federal-law-audit-requirements>.
- Chart of Accounts for PA Local Educational Agencies: [PDE Chart of Accounts 2022-2023](#)

Budget Checklist

The following checklist will be used to evaluate the budget. Please ensure that the grant and/or Budget Narrative includes a description of planned activities and expenditures. Specifically, describe how the budget supports the activities as described in ESEA §4303 (b)(1):

1. Open and prepare for the operation of new charter schools;
2. Open and prepare for the operation of replicated high-quality charter schools; and
3. Expand high-quality charter schools.

In addition, the budget narrative should include an explanation for why proposed use of funds are reasonable and necessary to execute the proposed activities. The Budget Narrative should enable the reviewer to easily determine whether or not the school is compliant with these requirements.

Budget Checklist	Check for “Yes”	Check for “N/A”
The budget conforms to General Guidelines and Restrictions, meets all allowable and unallowable cost restrictions, and accounts for the entire grant award.		
Budget supplements but does not supplant state and local funding, and budget is focused solely on the purpose and goals of this CSP subgrant proposal.		
Costs provided for budgeted line items are specific (including cost per unit and number of units), not vague or estimated.		
The budget does not include construction or extended salaries.		
The budget does not include recurring costs once designated revenue is available for those items.		
The budget does not include items that will be utilized by grade levels or student groups not intended to be covered by the grant or existing students outside the scope of an expansion project.		

The budget narrative demonstrates that the applicant will maintain financial sustainability after the end of the subgrant period.		
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School Project Budget Template Instructions

The School Project Budget Template is in Excel Macro format. When downloading the Excel, enable Macros if the computer prompts the applicant to do so. There are three tabs within the Excel Macro file. The first and third tabs are meant to be utilized as reference tools for the applicant.

1. The first tab – “Definitions” – outlines the 12 expenditure categories and identifies the specific Pennsylvania General Ledger (GL) codes that should be attributed to each allowable expense type. Basic definitions are provided.
2. The second tab – “Detailed Budget Worksheet” – must be populated by the applicant. Applicants must itemize their budgeted costs by fiscal year within each grant year.

Summation formulas are already populated into the template for the applicant as well as a “Insert Row” button for the applicant to enter a new budget line item as needed. In order to insert a new row: Select the cell in the row below where you want to add a new row. Then click the “Insert Row” button. As previously stated, all formula columns are prepopulated, so the grand total column will automatically appear. Do NOT add rows to the last three categories: recruitment, facility costs, and school bus. If you accidentally insert a row that was not needed, highlight the row and delete the entire row.

For all applicants, the Net Grant Request for each grant year must not exceed the limits provided below:

Grant Year	Year 1	Year 2	Year 3	Total Award
Awardees	\$1,100,000	\$200,000	\$200,000	\$1,500,000

Please note that applicant may not utilize all line items as outlined in the “Detailed Budget Worksheet” tab when preparing their proposed budget.

3. The third tab – “Summary Budget Worksheet” – is a reference tool for the applicant. Fields are locked and will automatically populate as the applicant completes tab two. Tab three summarizes the proposed expenses by GL code.

Guidance on the Detailed Budget “School’s Expenses Assumptions Column”

Budget assumptions should provide the reviewer, who possesses little knowledge of the elements of the proposed expenses, with sufficient detail in order to determine if the cost estimate is reasonable and based on supportable facts rather than guesswork. The applicant must identify, justify and/or explain:

- Each type of unit proposed;
- The number of units proposed;
- The cost per unit; and
- How costs were derived and determined to be reasonable.

Costs must be traceable to reality, being based on actual quotes, prices paid, or previous experience. If costs are based on historical knowledge or recent experience, the justification should state by whom the information was provided, when the quoted experience occurred and under which project. If a line item is based on quotes, provide the actual quote or summary of the discussion of an oral quote(s) received.

Make sure that similar costs throughout the budget are consistent. If, for example, a consultant plans to fly round-trip from Philadelphia to Boston and is scheduled for two or three trips in the course of the project, then the base cost for each ticket budgeted for the consultant's identical trips must be the same, including out-year escalations as add-ons as appropriate.

When possible (time and understanding of the project permitting), link the costs to the project activity. For example, rather than just saying "Consultant travel is based on 2 trips between Philadelphia and Boston based on travel agent quotes," add some programmatic language and say "Consultant A will make one trip in Year 1 to attend the implementation planning. Another trip is scheduled for Year 2 to attend Year 1 performance review."

Explain calculations. For instance, if the applicant has created an average labor rate, explain the calculation. "Mr. Smith's rate for the 2-year project is presented as an average of his current rate of \$200 per day and his year 2 rate escalated at 5%." Identify effective date of rate increases.

Applicant should provide more information to the reviewer regarding items in the budget which may not be understood simply by reading the budget.

Definitions of the Budget Categories

1. **Personnel and Fringe Benefits:** Itemize each individual staff member whose salary or wage will be supplemented with CSP funds. Identify each individual's position/job title along with his/her annual salary in whole dollars. Specify the level of effort percentage that they will work on this project. For each individual staff member, enter the supporting fringe benefits (medical, dental, social security, PSERS, unemployment, and other retirement). Provide details as to how the individual fringe benefits were calculated in the "School's Expenses Assumptions" column.

Salaries and wages should be based on the current annual salary rate or market rate for hourly employees for the proposed individual for the project year. An individual can be paid from both general funds and CSP funds. In the instance where this is the case, each projected salary is calculated by applying the annual salary rate of an individual to the level of effort proposed for the individual or position. For example, a full-time teacher with a salary of \$52,000, who will only spend 50% of his/her time on the project, should be reported in the budget columns with a total of \$26,000. In the "School's Expenses Assumptions" column, show the math that confirms this cost (full time teacher with a salary of \$52,000 who will only spend 50% level of effort; $\$52,000 \times 0.5$).

2. **Professional Development:** Amounts paid to purchase services associated with professional development and training, including: travel, tuition reimbursement, and supplies/materials costs. Schools should itemize the costs associated with providing the

service. For example, if it costs \$50 per hour to provide professional development training to instructors for 4 hours every month (10) of the school year, that should be reported in the budget as a cost of \$2,000. In the "School's Expenses Assumptions" column, show that math that confirms this cost ($\$50 \times 4 \times 10$).

Be specific about what types of professional development and whom it is for under the CSP grant funds. There are line items in the budget template for instructors, administrators, and board members. Itemize expenses per what type of professional development related activity.

3. Supplies: Amounts paid for costs associated with items of an expendable nature that are consumed, worn out, or deteriorated through use (not capital items). Refer to your school's purchasing policy.
 - a. Itemize each item to be purchased for this project.
 - b. In the "School's Expenses Assumptions" column, identify the item name, the purpose as it relates to accomplishing project goals, and the unit of measure being used. Also specify the quantity and unit cost for each item.
 - c. Routine materials or supplies for your organization's operational needs should not be included here, only those items specific to this project.
4. Professional Services: Amounts paid for costs associated with professional/consultant/contract services used for startup/expansion/replication work in these operational areas. These expenses are paid to personnel who do not work for the school. Wages are based on the current market rate for the project year.
 - a. Itemize each item to be purchased for the project.
 - b. Identify the item name, the purpose as it relates to accomplishing project goals, and the unit of measure being used. Also specify the quantity and unit cost for each item.
5. Technology (Supplies and Software): Amounts paid for costs associated with technology supplies and non-capitalized software licenses. Supplies should be between \$300 to \$5,000 in unit cost.
 - a. Itemize each item to be purchased for the project.
 - b. Identify the item name, the purpose as it relates to accomplishing project goals, and the unit of measure being used. Also specify the quantity and unit cost for each item.
6. Technology (Equipment): Amounts paid for costs associated with technology related costs at a per unit value of over \$5,000.
 - a. Itemize each item to be purchased for the project.
 - b. Identify the item name, the purpose as it relates to accomplishing project goals, and the unit of measure being used. Also specify the quantity and unit cost for each item.
7. Furnitures and Fixtures (Capitalized): Amounts paid for costs associated with furniture and fixtures. Attribute if cost exceeds threshold for school's capitalization policy and useful life if over one-year.
 - a. Itemize each item to be purchased for the project.
 - b. Identify the item name, the purpose as it relates to accomplishing project goals, and the unit of measure being used. Also specify the quantity and unit cost for each item.
8. Software Licenses (Capitalized): Amounts paid for costs associated with capitalized software costs. Attribute if cost exceeds threshold for school's capitalization policy and useful life if over one-year.

- a. Itemize each item to be purchased for the project.
 - b. Identify the item name, the purpose as it relates to accomplishing project goals, and the unit of measure being used. Also specify the quantity and unit cost for each item.
9. Technology Support: Amounts paid for all technology activities and services for the purpose of supporting instruction.
 - a. Itemize each item to be purchased for the project.
 - b. Identify the item name, the purpose as it relates to accomplishing project goals, and the unit of measure being used. Also specify the quantity and unit cost for each item.
10. Recruitment Costs: Amounts paid for cost associated with announcements on social media or in professional publications, newspapers, or broadcasts over radio and television, or cost associated with purchasing materials for recruiting and community engagement.
 - a. Itemize each item to be purchased for the project.
 - b. Identify the item name, the purpose as it relates to accomplishing project goals, and the unit of measure being used. Also specify the quantity and unit cost for each item.
11. Facility Costs to Meet Code: Under ESEA §4303(h)(3), grantees may use CSP funds to carry out “necessary renovations to ensure that a new school building complies with applicable statutes and regulations, minor facilities repairs (excluding construction).” Please contact pacspgrant@pacharters.org for additional guidance.
 - a. Itemize each item to be purchased for the project.
 - b. Identify the item name, the purpose as it relates to accomplishing project goals, and the unit of measure being used. Also specify the quantity and unit cost for each item.
12. School Bus Acquisition: Under ESEA §4303(h)(4), grantees may use CSP funds to provide one-time startup costs associated with providing transportation to students to and from the charter school. Please contact pacspgrant@pacharters.org for additional guidance.
 - a. Itemize each item to be purchased for the project.
 - b. Identify the item name, the purpose as it relates to accomplishing project goals, and the unit of measure being used. Also specify the quantity and unit cost for each item.

Travel and Transportation Detail

Budget travel for roundtrip, advance-purchase economy class airfare based on the current market rate and the school’s board-approved travel policies. Standard per diem (lodging, meals, and incidental expenses) is estimated based on current market rate and the school’s board-approved travel policies. Travel will be administered in accordance with U.S. government travel regulations and any additional limitations. A modest amount for related group transportation (airport transfer, Uber, taxis, parking, etc.) is included.

Budget each type of travel requested in the appropriate category. Specify the purpose or destination for the travel item, unit type, and quantity of units requested. Do not lump trips together into one amount; rather, itemize by travel category listed.

Letter of Intent

Must be provided in order to receive access to the application online portal.

For Each Subgrant Competition Year

_____ [school name] intends to apply for subgrant funds under the Pennsylvania Charter Schools Program (PACSP) for the purpose of opening a new charter school/expansion/replication.

Applicant requests a subgrant in the amount of \$_____.

I confirm that the school:

- Has an approved charter school application from a Pennsylvania authorizer; and
- Conforms to the federal definition of a public charter school in the Elementary and Secondary Education Act [P.L. 114-95, section 4310(2)]

The school's governing body voted to submit this Letter of Intent on _____ [date].

Board President's Signature: _____

Date: _____

Name: _____ Title: _____

Please upload a copy of this document to the online application portal.

Certification and Assurances

An original copy of the signed Certifications and Assurances must be postmarked (via mail) on the business day following the application deadline to: Charter Choices, ATTN: PACSP Grant, 222 N Keswick Avenue Glenside, PA 19038.

The charter school's Board President and Board-appointed authorized representative must sign below to indicate approval of the contents of this grant application and the receipt of program funds.

The Board of _____ (school name) hereby applies for and, if awarded, accepts the federal program funds requested in this application. In consideration of the receipt of these grant funds, the Board agrees that the General Assurances form used for all federal funds and the specific terms therein are incorporated by reference into this grant application. The Board also certifies that all relevant program and administrative requirements will be met. These include the Education Department General Administrative Regulations (EDGAR), the Office of Management and Budget Accounting Circulars, and the U.S. Department of Education's General Education Provisions Act (GEPA) requirement.

Charter schools that accept funding through the Pennsylvania Charter School Program (PACSP) agree to the following assurances:

1. Subgrant funds will be expended during the specified grant period; standard accounting procedures will be utilized by subgrant recipients and records of all subgrant expenditures will be maintained in an accurate, thorough, and complete manner.
2. Subgrant recipients confirm their understanding that funds for implementation activities will be awarded only if they are an open and operating school or have an approved charter public school application from a Pennsylvania authorizer and plan to open within 18 months.
3. Subgrant recipients will participate in all data reporting and evaluation activities as requested or required by the U.S. Department of Education, PACSP, and the school's authorizer, including on-site and desktop monitoring conducted by PACSP, annual independent audits required by the state that are publicly reported and include financial statements prepared with generally accepted accounting principles, annual reports, and a final expenditure report for the use of subgrant funds. This section includes participation in any federal or state-funded public charter school research or evaluations. Failure to submit required information may result in a withholding of grant funds or a non-renewal of subsequent year funding within the project period.
4. The applicant will fully cooperate with the U.S. Secretary of Education and PACSP in evaluating the program being funded by the grant.
5. The charter school is nonsectarian in its programs, admissions, policies, and employment practices, and all other operations, and will be in compliance with all Pennsylvania laws and administrative rules regarding staff certification and licensure.
6. Subgrant recipients will be aware of and comply with federal laws including, but not limited to: the Age Discrimination Act of 1975; Title VI of the Civil Rights Act of 1964; Title IX of the Education Amendments of 1972; Section 504 of the Rehabilitation Act of 1973; the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 et seq.); Section 444 of the General Education Provisions Act (20 U.S.C. 1232g) (commonly referred to as the "Family Educational Rights and Privacy Act of 1974"); and part B of the Individuals with Disabilities Education Act; and federal regulations applicable to the federal Charter Schools Program, including the Education Department General Administrative Regulations in 34 CFR parts 75-77, 79, 81, 82, 84, 97, 98, and 99, the Office of Management and Budget Guidelines to Agencies on Governmentwide Debarment and Suspension (Nonprocurement) in 2 CFR part 180, as adopted and amended as regulations of the U.S. Department of Education in 2 CFR part 3485, and The Uniform

Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards in 2 CFR Part 200, as adopted and amended in 2 CFR part 3474.

7. Subgrant recipients will comply with all applicable federal, state, and local laws and health and safety requirements, including but not limited to all laws related to student admissions and enrollment, non-discrimination, data reporting, compulsory student attendance, and accountability.
8. Subgrant recipients will comply with all provisions put forth by the U.S. Department of Education for the Charter Schools Program, including compliance with allowable activities. This section requires compliance with the Nonregulatory Guidance for CSP funds.
9. Subgrant recipients ensure that the public charter school will receive funds through programs administered by the U.S. Department of Education which are allocated on a formulary basis as deemed eligible.
10. Consist with the dissemination requirements of the annual state report card under Section 1111(h) of the ESEA, subgrant recipients will make publicly available (including on their website), information to help parents make informed decisions about the education options available to their children, including:
 - a. Information on the educational program;
 - b. Student support services;
 - c. Parent contact requirements (as applicable), including any financial obligations or fees;
 - d. Enrollment criteria (as applicable); and
 - e. Annual performance and enrollment data for each of the subgroups of students, as defined in Section 1111(c)(2) of the ESEA, except that such disaggregation of performance and enrollment data shall not be required in a case in which the number of students in a group is insufficient to yield statistically reliable information or the results would reveal personally identifiable information about an individual student.
11. It is the responsibility of each charter school that receives funds under this grant to comply with all required federal assurances. Any charter school that is deemed to be in noncompliance with federal or state statute and fails to address areas of noncompliance will not be funded. Funded schools will be expected to cooperate with PACSP in the development of certain reports to meet state and federal guidelines and requirements. Funded projects will be required to maintain appropriate fiscal and program records. Funded schools will be required to participate in desktop and on-site monitoring activities.
12. It is the responsibility of each Charter School that receives funds under this grant to provide PACSP with evidence of criminal background checks for board members and school staff.
13. Recipient schools and their authorizer will be aware of and comply with Executive Order 13513, "Federal Leadership on Reducing Text Messaging While Driving," October 1, 2009, by acknowledging that grant recipients and their personnel are prohibited from text messaging while driving a government-owned vehicle, or while driving their own privately owned vehicle during official grant business, or from using government-supplied electronic equipment to text message or email when driving.
14. Recipient schools and their authorizer certify that a high degree of autonomy, such as autonomy over operations, budget, and personnel, is built into its Charter consistent with the requirements of ESEA § 4310 (2) and ESEA § 4303 (f)(2)(A), and that they have sought, or will seek, all the appropriate automatic and other waivers to support the level of autonomy negotiated in their Charter.
15. The recipient school and their authorizer certify that any CSP subgrant deliverable created in whole, or part, with federal CSP funds will be openly and publicly licensed, unless otherwise excepted, per 2 CFR part 3474.20(c).

16. The recipient school is required to adhere to Executive Order 12549, Debarment and Suspension, as implemented as 2 CFR 180.200, which requires that recipients do not employ or use contractors that are indicated on the federal debarment listing.

Financial Controls and Audits

1. The recipient school shall maintain accounting records and procedures in accordance with state and federal requirements that ensure proper disbursement of, and accounting for, federal funds, including evidence pertaining to costs incurred, with the provision that the records shall be kept available by the grantee during the grant period and thereafter for seven full years from the date of final payment. The school agrees to submit upon request for audit, review, and inspection of its activities, books, documents, papers and other records relating to the expenditures of CSP subgrant proceeds.
2. Recipient schools will use an independent auditor for annual financial audits.
3. The authorizer is required to review the independent annual audits of financial statements prepared in accordance with generally accepted accounting principles and ensure that such audits are publicly reported.
4. Recipient schools and their authorizer will be aware of and comply with ESEA, Title V, Part B [20 USC 7221c. Section 5204, (e)(4)(B)], which states, "A local educational agency may not deduct funds for administrative fees or expenses from a subgrant awarded to an eligible applicant unless the applicant enters voluntarily into a mutually agreed-upon arrangement for administrative services with the relevant local educational agency. Absent such approval, the local educational agency shall distribute all subgrant funds to the eligible applicant without delay."
5. Any modifications and/or changes to the grant budget will meet the approval of the PACSP Project Team.
6. Recipient schools will ensure that the awarded grant funds will be spent or encumbered by September 30, 2025.
7. Recipient schools will ensure that independent audit reports will be completed and filled as necessary by December 31st, annually, following the fiscal year of June 30th.
8. Recipient schools will ensure that a single audit will be completed (when the recipient expends \$750,000 or more during the fiscal year) and filed to the PDE and Federal Audit Clearinghouse by established deadlines.
9. Recipients shall ensure that none of the funds authorized under the ESEA, including funds received under this grant program, shall be used (1) to develop or distribute materials, or operate programs or courses of instruction directed at youth, that are designed to promote or encourage sexual activity, whether homosexual or heterosexual; (2) to distribute or to aid in the distribution by any organization of legally obscene materials to minors on school grounds; (3) to provide sex education or HIV-prevention education in schools unless that instruction is age-appropriate and includes the health benefits of abstinence; or (4) to operate a program of contraceptive distribution in schools, Pub. L. 107-110, section 9526).
10. Recipient schools are required to keep and maintain all equipment purchased with grant funds in accordance with federal law and regulation. Should the charter school close, the authorizer agrees to notify PACSP of the reason for the closure and agrees to notify PACSP regarding the appropriate disposition of assets purchased under this grant.
11. Recipient schools are required not to have expenditures that exceed the approved budget line items by more than a total of 10 percent of the total project period award. If they wish to deviate beyond 10 percent in any budget object core category, they must seek a revision of their budget prior to expenditure or legal obligation of those funds, or they should not be reimbursed for the excess amount.

It is the responsibility of each charter school that receives funds under this grant to comply with all required federal assurances. Recipients will be expected to cooperate with PACSP in the

development and submission of certain reports to meet state and federal guidelines and requirements. All recipients are required to provide requested data to PACSP.

IF ANY FINDINGS OF MISUSE OF FUNDS ARE DISCOVERED, PROJECT FUNDS MUST BE RETURNED TO PACSP. PACSP may terminate a grant award upon thirty (30) days' notice if it is determined that the applicant is not fulfilling the requirements as specified in the approved project application.

Recipients will be required to keep and maintain all equipment purchased with grant funds in accordance with the requirements of federal law and regulation. Should the charter school close or be terminated by the authorizer, the charter school will work with PACSP regarding distribution of assets purchased with this grant.

The governing body of the charter school applicant has authorized the filing of this application and the undersigned representative has been duly authorized to file this application and act as the authorized representative of the applicant regarding this application.

I do hereby certify that all facts, figures, and representations made in this application are true and are correct and consistent with the statement of certifications. Furthermore, all applicable statutes, regulations, and procedures for program and fiscal control and for maintenance of records will be implemented to ensure proper accountability of funds distributed for this project. All records necessary to substantiate these items will be available for review by state and federal monitoring staff. All progress reports and the final report requested through this grant program will be filed on time. I further certify that all disbursements will be obligated after the grant has been awarded and the revised budget (if applicable) is approved and prior to the termination date; all disbursements have not been previously reported; and disbursements were not used for matching funds on this or any special project.

Charter School Board President (Printed Name)

Charter School Board President Signature

Date

Authorized Representative/Project Contact (Printed Name and Title)

Authorized Representative/Project Contact Signature

Date

Cover Sheet and Enrollment Information

Name of School: _____

Primary Contact Person: _____

Proposed Address: _____
Street Address/PO Box City State Zip Code

Phone: (Day) _____ (Evening) _____

Email Address: _____ Fax: _____

Federal Tax ID: _____ DUNS #: _____

Primary Contact for Facilities Planning: _____

Phone: _____ Email Address: _____

Name of Entity or Interest Group Applying: _____

Please Select Project Type: _____ New School _____ Replication _____ Expansion

Names, roles, and current employment of all persons materially involved in the preparation of this application or the organization or governance of the school (you may add lines as needed):

Full Name:	Current Job Title and Employer:	Position with School:

Does this applicant entity or interest group have charter school applications under consideration by any other authorizer(s) in the United States? _____ Yes _____ No

If yes, complete the table below, adding lines as needed.

State	Authorizer	School Name	Application Date	Decision Date:

General Charter School Information:

School Opening Date:	Proposed Initial Term:	Geographic Location*:	Opening Grades:	Grade Level at Full Enrollment:	Length of School Day:	Length of School Year:

*Identification of geographic area may be as specific as a school zone or as general as the school district targeted for school location but it must include the name of the local education agency (LEA) with authority over the area of the proposed school. Additionally, it may also include a specific neighborhood or school with the LEA.

Model or focus of proposed school (e.g., arts, college preparation, dual-language, and/or other):

Proposed Principal/Head of School Information (if identified)

Name of Proposed Principal Candidate: _____

Current Employment: _____

Daytime Phone: _____ Cell: _____

E-mail: _____

Enrollment Summary. Complete the following table indicating grades the school will serve.

Grade Level	Number of Students					
	Year 1	Year 2	Year 3	Year 4	Year 5	At Capacity (Year 20__)
Pre-K						

K						
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						

Student Demographics: Indicate if the below figures are actual or expected percentage of total student population.

Circle one: Actual Expected		
Free/Reduced Price Lunch:	Special Education:	English Learners:
African American:	Native Hawaiian or Other Pacific Islander:	Hispanic:
American Indian:	Multiracial:	Asian:
White:	Male:	Female:

Describe the rationale for the number of students and grade levels served in year one and the basis for the growth plan illustrated above.

School Management:

Does the school intend to contract with a third-party charter or educational management organization to manage the educational program and operations of the school?

_____ Yes _____ No

If Yes, identify the CMO or EMO:

Is the CMO or EMO for profit or not for profit: _____

Will school staff be employed by school or by the CMO/EMO: _____

Does the school intend to partner or be affiliated with an organization through which a single board governs or will each school have it's own governing board?

_____ Yes _____ No

If Yes, identify the organization:

Note About Management Organizations:

Charter School Program (CSP) grants are made to charter schools, not any other entity. Regardless of the charter school's relationship with a management organization, the charter school and board retain responsibility for all aspects of the grant including, but not limited to application submission, budget decisions, and repayment of any misspent funds. Items purchased by the school with CSP funds are and remain the property of the school, not the management organization.

Grant applications and budgets may not include any management fees that the school incurs as part of the management contract but may pay for allowable activities carried out by the school or the management organization.

If applicable, the full contract or agreement with the charter management organization (CMO) or educational management organization (EMO) must be included with this application to ensure it meets the definition of arm's length requirements. To be considered eligible, the school must

demonstrate that the CMO or EMO is not involved with the administration of the subgrant. The following factors will be considered:

- Whether the charter school's governing board is selected by, or includes members who are employees of the CMO or EMO;
- Whether the charter school has an independent attorney, accountant, and audit firm that works for the charter school and not for the CMO or EMO;
- Whether the contract between the charter school and the CMO or EMO was negotiated at "arms-length," clearly describes each party's rights and responsibilities, and specifies reasonable and feasible terms under which either party may terminate the contract (e.g., the charter does not lose the right to use the facilities);
- Whether the fee paid by the charter school to the CMO or EMO is reasonable for the type of management services provided; and
- Whether any other agreements (e.g., loans, leases, etc.) between the charter school and the CMO or EMO are fair and reasonable, documented appropriately, align with market rates, and include terms that will not change if the management contract is terminated.

As a general matter, subgrantees must avoid apparent and actual conflicts of interest when administering grants. For additional information on conflicts of interest, please see Section G of the federal CSP Nonregulatory guidance downloadable at [CSP SE Funding and Legislation](#).

Authorizer Notification

Authorizing Agency: _____ Authorizing Agency Contact Person: _____

Telephone: _____ Email: _____

Address: _____

ESEA § 4310 (6) requires all Charter School Program (CSP) grant applications must be provided to the charter school authorizer and the authorizer must verify that the CSP applicant charter school has notified them of application submission. The signature by the designated official from the charter school authorizer signifies that this requirement has been met.

Authorizer Official Printed Name and Title: _____

Signature: _____ Date: _____

Grant Application Narrative

Executive Summary

Provide a one-page executive summary for your grant application. The executive summary must be double spaced, 11-point font in Calibri or Times New Roman. The executive summary should include the following information:

- Overview of the organization and the school;
- Vision for the project;
- How the project aligns to the following objectives:
 - Increasing the number of high-quality charter schools that educate substantial at-risk student populations; and
 - Improving student outcomes in PA charter schools, particularly for at-risk students.
- A description of 3-5 goals for the project; and
- How CSP funds will help achieve those goals.

Application Narrative

Each applicant must convince the Peer Review Team that the proposal will result in a quality educational program. Focus will be placed on the applicant's soundness of planning and the ability to link the specific activities described in the grant project to the charter school's educational vision. Limit to thirty pages, double spaced, excluding required attachments. See supporting Application Narrative Rubric.

Applicants are strongly encouraged to set up their Application Narrative in the order of the supporting Application Narrative Rubric. Label each section accordingly so the Peer Review Team can easily identify supporting evidence.

The qualitative portion of the PACSP subgrant application has been adapted in part from [PCPCS' Quality Standards](#) – a pre-existing framework for assessing the capacity of Pennsylvania charter schools across six key domains: (1) Academic and Continuous Improvement; (2) Effective and Ethical Leadership; (3) Culture, Community, and Relationship Building; (4) Operations; (5) Governance; and (6) Finance. The Quality Standards instantiate Pennsylvania's idiosyncratic definition of a "high-quality charter school," which is one that: (a) "provides a safe and inspiring education equipping all its students with the knowledge, skills, confidence, and determination to thrive in and contribute to a diverse global society"; and (b) "is governed by an ethical not-for-profit board and employs effective leaders, faculty, and staff unwavering in their commitment to educational and operational decisions made with the instructional needs of students at the forefront".

A listing of each Quality Standard is attached to this RFA. Each Quality Standard includes a set of indicators to help define high quality. The complete [Quality Standards Workbook](#) can be found on the PCPCS website and can be referred to when addressing each of the standards. With each high-quality indicator, the document lists key questions and evidence that may be helpful when addressing each standard.

The narrative must address, in sequential order, each standard in the [PCPCS Quality Standards Workbook](#) and encompass each indicator as it relates to the standard. A scoring rubric will be used by reviewers to evaluate the application and will count as 50 percent of the application score for new schools and 35 percent for expanding or replicating schools.

Project Specific Narrative

Each applicant must provide an additional narrative – Project Specific Narrative – that focuses on the following information. Limit to two pages, double spaced, excluding required attachments for this section. See supporting Project Specific Narrative Rubric.

Applicants are strongly encouraged to set up their Project Specific Narrative in the order of the supporting Project Specific Narrative Rubric. Label each section accordingly so the Peer Review Team can easily identify supporting evidence.

Subgrantees must include the following information:

- A detailed description of how the school plans to enroll significant numbers of at-risk students and how it plans to provide those students with instructionally rigorous and culturally affirming educational experiences;
- A detailed budget and budget narrative that explain how subgrant funds will be used to support the opening and preparation for operation of a new, expanded, or replicated school, along with a detailed explanation of how programming will be sustained after the close of the grant period;
- An organizational chart that depicts how roles and responsibilities will be apportioned among key individuals and entities, including the Board of Trustees, lead person, charter management organization (CMO), staff, and external partners;
- A copy of the written charter (see 24 Pa. Stat. Ann. § 17-1720-A) that sets forth the manner in which the school will be held accountable and the flexibilities and autonomies it is afforded as a charter operator;
- A description of how the eligible applicant will solicit and consider input from parents and other members of the community on the implementation and operation of each charter school that will receive funds under the PACSP program;
- A description of how the eligible applicant will support the use of effective parent, family, and community engagement strategies to operate each charter school that will receive funding under the SE's program; and
- A description of how the school will work with school districts to ensure students receive transportation consistent with the requirements of 24 Pa. Stat. Ann. §§ 17-1726-A.

Competitive Preference Priority Plan

Additional points may be awarded for schools that submit a Competitive Preference Priority Plan to serve and intentionally meet the needs of students within the following target subgroups. Limit to two pages, double spaced. See supporting Competitive Preference Priority Plan Rubric.

Applicants are strongly encouraged to set up their Competitive Preference Priority Plan in the order of the supporting Competitive Preference Priority Plan Rubric. Label each section accordingly so the Peer Review Team can easily identify supporting evidence.

- Providing services in Qualified Opportunity Zones;
- Providing services to rural communities;
- Educating high school students;
- Serving at-risk student populations,
- Promoting equity and inclusion; and
- Contributing to the diversity of charter school models in existence across the Commonwealth.

Track Record (Expanding or Replicating Schools Only)

Charter schools already in operation and planning to expand or replicate must provide additional information:

1. A disaggregated breakdown of student performance by race, gender, and special populations at all schools affiliated with the operator in all regions; and
2. A municipal audit of financial accounts for the past five years, or all years of operation if less than five years.

Applications to expand or replicate schools will be evaluated based on their documented track record in the areas of academic success, organizational compliance and viability, and financial health and sustainability.

Limit to ten pages, double spaced, excluding required attachments. See supporting Track Record Rubric and Track Record Rubric Template.

Applicants are strongly encouraged to use the Track Record Rubric Template to organize their supporting evidence and reference any additional attachments as necessary.

Required Attachments Checklist

The following appendices are required. They are not included in the Application Narrative, Project Specific Narrative, and Competitive Preference Priority Plan page limits.

Number	Attachment Component	Naming Convention for Upload	✓
1	Qualifications and Resumes of Chief Executive Officer/Head of School/Principal	(School Initials)_CEOQual	
2	Job Description or Qualifications, Timeline, Criteria, and Recruitment/Selection Process for Chief Executive Officer/Head of School/Principal	(School Initials)_CEOSelection	
3	Qualifications and Resumes of Founding Coalition (new charter school applications only)	(School Initials)_FoundingQual	
4	Qualifications and Resumes of Board Members	(School Initials)_BoardQual	
5	Complete Staffing Chart	(School Initials)_StaffChart	
6	Proof of 501(c)3 Non-Profit Status and Federal Tax-Exempt Status (or copies of filings)	(School Initials)_NonProfit	
7	Articles of Incorporation	(School Initials)_AOI	
8	Board Bylaws	(School Initials)_Bylaws	
9	Conflict of Interest Policy	(School Initials)_COI	
10	School Financial Policies and Procedures	(School Initials)_FinPolicies	
11	School Enrollment Policies and Procedures	(School Initials)_EnrollPolicies	
12	Intent to lease or purchase as well as supporting documents providing details of facility	(School Initials)_Facility	

13	Evidence of secured grants or application for grant funds (other than CSP)	(School Initials)_Grants	
Project Specific Narrative Attachments			
14	School Project Budget Template	(School Initials)_BudgetTemplate	
15	Budget Narrative	(School Initials)_BudgetNarrative	
16	School Organizational Chart	(School Initials)_OrgChart	
17	Approved charter from a PA authorizer	(School Initials)_Charter	
18	Artifacts for parent, family, and community engagement	(School Initials)_CommEngagement	
19	Transportation policies and procedures	(School Initials)_Transportation	
Track Record Attachments (Expansion or Replication Applicant ONLY)			
20	Pre-existing student data	(School Initials)_StudentData	
21	Audited Financials (up to last 5 years)	(School Initials)_Audits	
22	990s (up to last 5 years)	(School Initials)_990s	
23	Internal Financials (up to last 3 years)	(School Initials)_IntFinancials	