



U.S. Department of Education  
Office of Elementary & Secondary Education  
Charter School Programs  
FY22 Pre-Application Webinar – Developer Competition (ALN  
84.282 B/E)  
Session Transcript  
Presented July 11, 2022

- [Dr. Hinton] Good afternoon, everyone, and welcome to the pre-award technical assistance webinar for the FY 22 developer competition. As Courtney just mentioned, I'm Anna Hinton, the director of the Charter Schools Program. The purpose of this webinar is to provide a high-level overview of the FY 22 developer notice inviting applications and the overall application process. We will not discuss in any great detail any one aspect of the competition requirements, etc., which is why I do want to draw your attention to the note on the cover slide, encouraging interested applicants to refer to the notice inviting applications for a full listing of the eligibility requirements, application requirements, priorities, selection criteria, definitions, as well as process for submitting an application.

We have a ton of content to discuss, so we are going to go ahead and get started. Next slide. Next slide.

Thank you. So, our agenda for today, as you can see, is full of content.

Not only do we want to provide a welcome and introduce you to members of the developer team, but we also just want to touch on some reminders and notes of things to sort of track, and know, and pay attention to throughout the entire application process.

We're also going to spend a great deal of time talking about what's new in FY 22 for the Developer Grant Competition, and in particular, implications of our recent final rule as it relates to this year's developer competition. We will then go into an overview of the Developer Grant Program, talk a little bit about how to pull together your application as well as the various components of the application, take a deeper dive into the nuts and bolts of the developer NIA, and this is where we will spend some time talking about priorities and selection criteria, the application requirements and assurances, and the performance measures.

And then we'll conclude by talking about how to submit your application, as well as providing an overview of the application review process, and then our final Q&A session. As you can see from our agenda, we have a lot of time for Q&A throughout today's webinar, and I will talk a little bit more about how we plan on sort of structuring those opportunities today.

So, now to talk a little bit about my co-presenters in the developer team, so, co-presenting with me today is the entire developer team, led by Stephanie Jones, who's the supervisor. And also joining us, our program officers, Porscheoy Brice and Leslie Hankerson. Also on this slide, and you will see this throughout the webinar, we have created a developer competition email account, and this is really the best way for you to communicate directly with the developer team concerning any and all aspects of the application review process, the application process itself, submission process, or any questions you just might have about the NIA or anything associated with this year's competition.

Next slide. Webinar logistics. So, as we've sort of addressed already, today's webinar is in listen session, listen mode only. We do have a Q&A opportunity, but we ask that you use the Q&A chat function to submit your comments.

The session will be recorded and posted to the CSP's website. We will post the slide deck, a transcript of the recording, along with the actual audio recording. And, again, we want to draw your attention to this email...to the developer competition email account. This is, again, your best way to communicate with the developer team. Important reminders and notes.

So, interested applicants should refer to the Notice Inviting Applicants in the Federal Register for a complete listing of all the requirements, selection criteria, priorities, etc. You will see disclaimers, and we'll remind you throughout the entire presentation for today, our slide decks will not contain the full components or sub-parts of requirements and selection criteria, so it is important that you not rely solely on this slide deck or even this webinar for guidance and instructions for how to submit and respond to the requirements identified in the NIA.

We strongly encourage you to read more than once the NIA itself. As I've mentioned as well, we've budgeted time for Q&A. Participants should submit their questions via the Q&A function, and we ask that you only submit questions relevant to the topics being discussed, so that's why on the agenda slide, we do pause within as we...before we transition to the next topic to take Q&A.

So, I ask that you submit those questions when we have concluded on those particular sections. Due to time constraints, we may not be able to answer all the questions received. And if we do not, if we are not able to answer your question, we ask that you again send it to our email box.

As a follow-up to today's webinar, we will host an Office Hours webinar next Monday, the same time, where we will answer any questions we weren't able to answer today or for the rest of this week as you are, if you do email us. So, we are taking that opportunity on Monday to try to compile a list of commonly asked questions or frequently asked questions and provide answers for you next Monday.

Again, the goal is to try to solicit these questions ahead of time, it allows us to be able to come prepared and be able to fully respond to the questions. It also gives us an opportunity to consult as needed with our Office of General Counsel. So, again, we are requesting that you send all questions ahead of time as soon as possible this week that you would like for us to try to answer next Monday.

And then finally, there are also some questions that regardless of when we receive them, we may not be able to answer them. For example, we are not able to address questions about the competitiveness of a specific entity or project design, nor are we able to provide a substantive explanation of the rationale behind the inclusion or exclusion of specific requirements.

Just to note, in the NFP that was recently published last Wednesday, we did provide a detailed discussion and rationale for some of the actions that have been proposed. So, if you do have a question about rationale or just want to better understand the department's thinking as it relates to any of the new actions, I would like to draw your attention to the NFP for a longer discussion.

Next slide. So, before we jump into a detailed discussion about the Developer Grant Competition, we would like to just provide some background on the overall purpose and structure of the Charter School Programs. The program statute identifies seven main purposes for the CSP. However, in the interest of time, I'm not going to discuss each purpose in detail, but we'll say that generally, CSP provides federal assistance for the planning, program design, initial implementation, replication and expansion of high-quality charter schools to include assistance with charter school facilities financing, the sharing of information about promising practices, and investing in national initiatives that support the charter sector.

The program structure of the charter schools programs. Next slide. The CSP consists of six key grant competitions, each which supports activities important to the success of charter schools.

I do want to note that our ability to run competitions in each program annually depends on a number of factors, including the availability of funds. So, there are six programs in the CSP, the first is the grants to state entities, and this is really the largest CSP grant component. These grants are awarded to state education agencies, governors, state charter school boards, or state charter school support organizations, who in turn award sub-grants within their states for the planning and initial operation of new charter schools.

The next two programs are facilities-related programs. The second program is the credit enhancement... Oh, I'm sorry, the next program is charter management organizations, I'm jumping ahead of myself. And under the CMO grant program, we award nonprofit charter management organizations funds to create new charter schools or expand existing charter schools based on evidence.

So, they must have some sort of evidence to support their capacity and success with opening new charter schools and expanding existing charter schools. The next two programs are facilities-related programs. So, the third is the credit enhancement program, which provides funds to support charter schools and acquiring and renovating facilities.

And then the fourth is the charter school facilities incentive grant program, which provides matching funds to state that provide funding for charter school facilities on a per-pupil basis. Next, we have the National Dissemination Grant program, and the key purpose of this program is really to increase the quality of charter schools in the sector by disseminating best practices related to charter school operations and management.

And then finally, we have grants to developer, which is the subject of today's webinar. Under this program, in states where there isn't an active state entity grant, individual schools and CMOs may apply directly to the U.S. Department of Education for funds to support opening a new school or to replicate and expand to a high-quality school.

So, that's the sort of background on the charter school programs. Next slide. So, now that we've provided that background and talked a little bit about the overall purpose of the CSP, we'd like to transition to a discussion of the FY 2022 Developer Grant Competition, and in particular, I'm going to focus on and discuss the implications of the new rules for this year's competition.

As you know, as many of you know, too, that the... I'm sorry, before...I'm jumping ahead of myself, my apologies. Today's conversation, this discussion that we're about to have, is intended, or is not intended, I should say, to be a review or even a discussion of the rationale for each of the newly established actions in the final rule that I just mentioned, but rather, we are hoping today that we will focus today only on those actions that are being implemented in this year's FY 2022 Developer Grant Competition.

So, we're only going to focus on those actions in the new rule that are being implemented in this year's developer competition. Recognizing that there is likely interest in better understanding and explaining all of the new actions in the final rule, we are committed to offering an explainer webinar on the rules at a future date. So, on to the new rule.

Last Wednesday, July 6th, the department published in the Federal Register the final notice of priorities, requirements, definitions, and selection criteria for the state entity, CMO, and Developer Grant Program. So, we address three programs under one notice. We received nearly 27,000 comments and responses to the proposals. And I would also just like to take this opportunity to thank those of you who took the time to submit comments.

We believe that the public comment process worked, as we've made significant revisions to some of the rules that were initially proposed in our NPP. And please, know, too, because many commenters addressed this issue and asked the question, but these rules that we finalized last Wednesday serve to supplement and not replace the rules that were previously established for the Developer Grant Program in 2019.

And I'd also like to point out that the rules that were established in 2019 are still being used in this year's grant competition. So, the establishment of the new rules was never meant to replace any existing rules, but, again, to be used in a supplemental manner.

So, now I do want to start by talking about the new priorities for this year's developer competition and also want to reiterate that the public comments received really informed how some of these new rules are being implemented in the developer competition this year.

In the final rule, the department created two new priorities that could be used in future competitions. One, focused on promoting the creation of educator-led and community-centered charter schools, and the other, which focused on promoting collaborations between charter schools and traditional schools and school districts. In both the notice of proposed priorities as well as the final rule, we did not, the department did not indicate how we would operationalize these priorities in future competitions, and we did so because it is standard practice in the department not to identify priorities and NPPs or NFPs as absolute competitive preference or invitational.

Instead, we reserve operationalizing those priorities in the NIA, and that's what we did in this instance with developer. So, in this year's developer competition, if you refer to the notice inviting applicants, only one of the priorities that I just mentioned will be used to essentially impact funding, and that is the educator-led and community-centered priority.

In this year's competition, this priority is being used as a competitive preference priority. Additional points will be given to those applicants that seek to address this priority. Again, based on feedback from public comment process, the charter-district collaboration priority is only being used this year as an invitational priority.

Especially for those developer applicants, they were concerned that applicants would need more time, more than the 30 days that we would likely be able to allow, in order for them to adequately address this priority. And given the limited time that we know we will have available for applicants to submit their application or project proposal, the administration has decided to only use this priority as an invitational priority.

And so, no additional points will be given to applicants that seek to address this priority. And for those applicants that do address the priority, they will not have a competitive advantage over other applicants.

The value of an invitational priority really is to inform how the department may want to use the priority in the future. It gives us the ability to basically test the priority out to see the types of projects that we are getting, the quality of the responses to those priorities to, again, inform how they are used in future competitions. And I do want to just also underscore a note that we've included in the NFP, and just point out that the Biden administration, in the NFP, also committed to never using the charter-district priority as an absolute priority or a requirement for applicants during his term.

So, in future competitions, the administration will only consider using the charter-district priority in developer as an invitational, as we are currently doing this year, or maybe as a competitive preference priority, but we will never use, under the Biden administration, this priority as an absolute or even require all applicants to address it.

So, again, just to recap on the priorities front, in the developer competition, there is only one CPP being used, and that is the educator-led and community-centered priority, and then the charter-district collaboration priority is being used as an invitational. Next slide. So, the first priority is the needs analysis priority, or formerly known as the community impact analysis.

And, again, you know, sort of consistent with our response to public comments on the charter-district collaboration priority based on feedback regarding the community impact analysis, now renamed needs analysis, and based on feedback concerning challenges that developer grantees may have with addressing these requirements in the short sort of application window that we are providing for applicants to submit their applications, the community impact analysis needs assessment is not being used in the developer competition this year.

The needs analysis requirement is presented in the NFP, but, again, we are not applying it to developer this year. Instead, the department has opted to rely on the EDGAR selection criteria for need for project to ensure that applicants address the administration's desire for discretionary grant applicants to ensure that their proposed projects address the needs of students and families in the communities in which they serve.

The EDGAR selection criterion for need for project is a commonly used selection criteria across a number of discretionary grant programs in the department. And, again, we provide a detailed, I think, discussion, our decision here in the NFP side, I'd like to draw your attention to that section of the NFP for more information.

Developer applicants, however, will be required to address all of the new requirements associated with the submission of information related to any existing or planned contracts with for-profit management organizations. And so, this particular requirement is Requirement K in the NIA, and we are essentially asking applicants that for any existing or proposed contract with a for-profit management organization, to submit information on those contracts.

And we list out in the notice itself a number of sort of sub-parts associated with the requirement, a number of issues that we'd like the applicant to address. And essentially, with this requirement, we're asking the applicant to address and ensure...well, we have a related assurance with this, but in the requirement, we're asking that the applicant submits information on their management contracts and ensures that the non-profit CSP grantee maintains full and substantial administrative control over the charter school or charter school project.

We also provide a revised proposed requirement and providing greater flexibility for applicants to submit equivalent information that they may have already submitted to their charter authorizer. Again, you know, I won't go over every single sub-part of this requirement, just, you know, touch on some of what we're asking about, but we're asking for a copy of the existing contract with the for-profit management organization or description of the terms, description of any business or financial relationship between the charter school developer and the management organization, name and contact information of each member of the governing board of the charter school, and a list of the management organization's officers, chief administrator, and other administrator, and any staff involved in approving or executing the management contract.

We do ask for a description of how the applicant will ensure that the members of the governing board of the charter school are selected, removed, controlled, or employed by the for-profit management organization, and that the charter school's legal, accounting, auditing services will be procured independently from the for-profit management organization. And then finally, the last few sub-parts, we do ask for an explanation for how the applicant will ensure that the management contract is severable, and we ask that the applicant provides a description of the steps the applicant will take to ensure that it maintains control over student records upon transfer of the student from a charter school to another public school.

And so, that's the for-profit requirement itself. Again, please refer to the NIA for the full text associated with that requirement. We also add another requirement, requesting that the developers...we created a new requirement, I'm sorry, requesting that the developer applicants essentially provide more information on the charter authorizing process.

I do want to note that a charter school developer that has applied to an authorized public chartering agency for approval to operate a charter school is eligible to apply for a CSP grant, even if the developer has not yet received an approved charter or secured a facility. And just quickly, under this new requirement, we're asking for the name and address of the authorized public chartering agency that issued the applicant's approval or, if the applicant has yet to receive an approved charter, the authorized public charter agency to which the applicant applied, so we want the name and contact information, a copy of the approved charter.

Or, again, if the applicant has yet to receive approval, a copy of the charter application, we're asking that the applicant submits that, a copy of the charter application that was submitted to the charter authorizer, including a date that it was submitted and an estimated date by which the authorized public chartering agency will issue a final decision. And then the last two sub-parts, documentation that the applicant has provided notice to the public chartering agency, that authorizer, that it has applied for a CSP grant, and then a proposed budget, including detailed description of any post-award planning costs that the applicant has.

And so, those are some of the new requirements. Next slide. So here, again, I'm not going to go through all of the assurances, but this slide does lists all the new assurances, I'm not going to read them in detail.

There's a great deal of alignment in terms of the content of these assurances with the requirements. So, we're essentially sort of doubling down on some of these issues that are presented as requirements, also doubling down on them in assurances. Just a little background in terms of the connection between the two, and when I say the two, meaning an assurance as well as requirement.

In an assurance, we essentially, as a department, state what, you know, our desired goal is or what it is that we want to see from applicants, and then applicants in turn certify or assure that they will do X, Y and Z. However, with requirements, the applicant describes how they are going to do the things that we are asking for.

And the extent to which these assurances and application requirements are evaluated by peer reviewers varies depending on the selection criteria. And so, in this case, again, one, because we are not even using the needs analysis requirement and all of its sub-parts, I know there were some concerns about charter schools that are being proposed in homogeneous communities or that are racially isolated would not be eligible, they are eligible for CSP funds.

And their status as it relates to diversity will not be used to place them at a disadvantage, from a competitive standpoint. So, I just want to sort of point that out as well. Just to quickly go through and touch on some of the assurances, the first one, or Assurance D, is related to the for-profit management contracts, as well as E, D and E.

We also talk about, in F, requiring applicants to...or I'm sorry, requesting that applicants are sure that they will post on their website copies of their contracts as well. G, we are seeking an assurance from applicants that they will disclose as part of the enrollment process any policies or requirements and services that are not provided by the charter school.

And H, an assurance that the applicant will hold and participate in a public hearing in the local community. We also note in the NFP that this assurance can be met as part of or concurrent with a public hearing, that the applicant participates or conducts for other purposes, like as part of a pre-opening requirement of a charter school authorizer or under state law.

So, again, you can sort of meet this assurance in other ways. And then I, just addressing the use of implementation funds versus planning funds, and wanting to make sure that the applicant provides assurance that it will not use implementation funds for a charter school until after the charter has been authorized and a facility has been secured. It does not mean that an applicant may not receive, may not be awarded grant funds.

So I do want to make that distinction. And we're going to talk a little bit more about the use of planning versus implementation funds a little later in the presentation as well. The only



additional note that I'd like to add as it relates to this assurance is that the department also...you know, we recognize that the charter approval process may exceed the 18-month planning period for CSP grants.

Just as a reminder, you know, with CSP funds, grantees are given 18 months for planning, and we recognize, again, that the charter approval process may extend beyond the 18 months. And so, I just want to note that grantees may also request an amendment for an extension. It doesn't mean that we...there's no guarantee that that amendment will be automatically approved, it just depends on the facts and the context, but it is absolutely a possibility.

So, with that, next slide. Finally, we also created new selection criteria for the Developer Grant Program. This new selection criteria will appear or does appear in the quality of the charter school's management plan in the NIA.

We essentially created three sub-parts that align with the for-profit management requirement itself, and the first is the adequacy of the applicant's plan to maintain control over all CSP grant funds. The second is the adequacy of the applicant's plan to make all programmatic decisions. And then the third is the adequacy of the applicant's plan to administer and supervise the administration of the grant, including maintaining management and oversight responsibilities of the grant.

Next slide. So, that sort of concludes my overview of the implications of the new rules in this year's FY 22 developer competition. Quickly, I do just want to touch on some competition basics we have.

Currently, roughly 4 million available in funds, and that number may change, will likely increase a little bit, just depending on how things sort of pan out in other parts of the CSP. But currently, we have roughly 4 million available for developer awards.

The estimated range of the awards, anywhere between \$150,000 to \$300,000 per year, with the estimated size being 225,000. And, again, we're estimating 8 to 10 awards, with a project period of up to 5 years. Again, this is another place where I do strongly encourage you to refer to the NIA as well as the application package for additional information.

Finally, before we pause to take questions, you know, the deadline is August 5th, 11:59 p.m. I ask that you please get your application in before August 5th, and please do not wait until the last minute to submit. With that, I will now pause and ask that you please submit any questions that you have on anything that I've addressed in this section.

And we will come back shortly with... So, thank you all for your patience. So, some of the questions that we've received, we're actually going to touch on these topics as we move forward with the webinar. So, eligibility is one issue that we will certainly hit on next, actually. One question I will go ahead and address now, and this is a question about the charter, approved charter application.

When we submit our approved charter with the grant application, do we also submit the attachments or only the main charter application document? So, a couple of things. There are file limitations, there are some limitations to the types of files that you can actually submit with your grant application. We're going to touch on this a little bit more later on in the webinar, but at a minimum, you should definitely include the main charter application document and apps.

And certainly, post-award, if you are successful, we will continue to communicate and there will be other ways that you can transmit additional information. But at a minimum, the charter, the main charter application document. I would say, as a general rule, you should try to address all parts of the application requirement, but just know in this instance, there may be some limitations based on the types of files that you are trying to upload.

And, again, we'll talk a little bit more about that later in this webinar. So, with that, I will now turn it over to Stephanie Jones, who will get us started with an overview of the developer program. Thank you.

- [Stephanie] Thanks, Anna. So, as Anna said, I'm going to go over the developer program. Just a reminder, my name is Stephanie Jones, and I am the supervisor of the CMO and Developer Programs. So, here, we outline the purpose of grants to developers. So, the developer grants are intended to support charter schools that serve early childhood, elementary school, or secondary school students by providing grant funds to eligible applicants.

And there are two funding streams. The first is identified by its Assistance Listing Number, 84.282B, as in boy, and this is for the opening of new charter schools. And the second is Assistance Listing Number 84.282E, as in eagle, and this is for the replication and expansion of high-quality charter schools.

And later in the presentation, we'll be talking a little bit more about the difference. But those are the two funding streams. Next slide, please. So, what is a developer? And this definition is included in the NIA. But a developer is 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.

Next slide. So once again, we have those two funding streams that I talked about, B and E, and the...it's important to note that applicants may only propose to support one charter school per grant application.

And here, we've included the definitions of expand versus replicate. So, when we say expand, when used with respect to a high-quality charter school, it means to significantly increase enrollment or add one or more grades to the high-quality charter school.

In the case of replicate, it 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.

Next slide, please. So, now we're going to talk about eligibility. Eligible applicants are developers that have, one, applied to an authorized public chartering authority to operate the charter school and, two, provided adequate and timely notice to that authority. Eligibility is limited to charter school developers in states that do not currently have a CSP state entity grant under the ESEA, as amended by ESSA.

As a general matter, the secretary considers charter schools that have been in operation for more than 5 years to be past the initial implementation phase and are, therefore, ineligible to receive CSP funds under Assistance Listing Number 84.282B, opening of a new charter school, or Assistance Listing Number 84.282E for the replication of a high-quality charter school.

They would, however, be eligible under 84.282E for the expansion of a high-quality charter school. Next slide. So, this slide illustrates what I just mentioned about eligibility based on state, and, again, we are going to be sharing these slides, and we will post these tables on the website as well. But it lists all states that have an active state entity grant, and it also notes whether or not applicants are eligible from that state.

I do want to point out that we are not able to accept applications from applicants in South Carolina. South Carolina was mistakenly left off of the list that was included in the NIA. But otherwise, this mirrors what's in the NIA, and, again, we will share these slides, and this will be posted on our website.

Next slide, please. So, I'm not going to go through this, it reiterates what I just stated about eligibility. But what I would like to do then is go to another...give you another opportunity to ask questions. So once again, if you could focus your questions on the content we've just reviewed and post them in the chat, and we will review them, thanks.

One that I do want to address is, the question was, can a charter school apply to the grant if they have not yet applied to an authorizer for a charter school? So, as stipulated in the grant, you have to have at least applied for your charter. And you can find out more information about that in the NIA.

All right, next slide, please. So, now we're going to talk about pulling together your application. Next slide, please. So, where to find the application. So, the application package can be found on [grants.gov](https://grants.gov). And we've provided the links, there is a package for each of the funding streams, so B versus E.

And then the application package and other supporting materials can also be found on the CSP website. We have a Fiscal Year 22 Developer Competition website. Next slide, please. So, these are the components of the application package. There are required forms, the application narrative, and the other attachments.

And in the next few slides, we're going to be going through each of these. Next slide, please. All right. So let's talk about the required forms. So, here we list the forms that you will require to submit with your application. There are standard forms, and then there are assurances and certifications.

All of these are available in grants.gov with the application package. And now, we can go through a few of them. Next slide, please. So, this is the SF 424 form, we included here an image of what it looks like. And on the next slide, I'm going to point out a few tips about it.

Next slide, please. So, on that form, some things to keep in mind. One, use your organizational UEI, and this should be the same UEI that you were issued whenever you register with grants.gov.

And then also include the congressional district. And you should enter the... Excuse me, sorry. You should enter the district for the applicant organization where it's located and the district in which activities will occur.

For the proposed project start and end dates, the start date will be October 1st, 2022. This grant can be for up to five years, so the end date should reflect how many years are requested. For estimated funding, this should only reflect the first year of the project. And then Executive Order 12372, this program is subject to that executive order.

Next slide, please. Thank you. So, this is the ED 524. Section A of this form is required, and you should complete all years for which funds are being requested.

And, again, this grant is for up to five years. And funds requested should match the detailed budget narrative that's required in another section of the application. And I do want to point out that if there is misalignment between the figures that are in this document, the ED 524 document, versus the budget narrative, we will use the figures that are in the ED 524 form, this form.

But please make sure that it aligns, that the ED 524 form and your budget narrative align. Next slide, please. So, a few other notes on the ED 524 form. As I stated, Section A is required.

And make sure that funds requested, that they match in that form as well as your budget narrative. If you have an approved indirect cost rate, provide the details in the budget narrative as well as in the bottom of this form. Construction is not an allowable cost. And Section B should only be completed if you are making a matching commitment.

This program does not require a match. Next slide. So, now we're going to talk about the application narrative. Next slide, please. These are the components, it includes an abstract narrative, the budget narrative, and the project narrative.

And the project narrative is where you will address the competitive preference priority if you choose to write to it, the selection criteria, and the application requirements. And we're

going to be going through all of those. Next slide. So, the abstract narrative, you should include the name and address of the organization, the name, phone number, and email address of the contact person for the project.

It should not exceed one page. It should use language that can be easily understood by a range of audiences. And it should include the project title, goals, expected outcomes, and contributions for research, policy, and practice. Next slide. For the budget narrative, applicant should ensure or must ensure that all costs included in the proposed budget are reasonable and necessary in light of the goals and objectives of the proposed project.

Any costs determined to be unreasonable or unnecessary will be removed from the final budget. The budget should include only costs that are allowable, reasonable, and necessary. In the Budget Narrative Attachment, please provide an itemized budget narrative, separated by project year for each budget category, in addition to a justification for the cost that you include.

Next slide. So, here, we are providing some links to some budget narrative resources. And I also want to point out that we have a pre-recorded webinar that's available on our website, and we'll be mentioning it again in this presentation, that focuses on the budget.

Next slide. So, some funding considerations. Once again, this is a non-construction grant, so CSP funds may not be used for construction or to add to the permanent value of a property or appreciably prolong its life.

Applicants should use the budget period of the grant, not your fiscal year budget period. Successful applicants' grant period will start on October 1st, 2022. An applicant may only propose to support one charter school per grant application. And also, funds can only be used for the grade level or levels that are included in the grant application.

So, funding restrictions and budgets. Grantees must use the grant funds to open and prepare for the operation of a new charter school, to open and prepare for the operation of a replicated high-quality charter school, or to expand a high-quality charter school.

Grant funds must be used to carry out allowable activities, described in Section 4303(h) of the ESEA. And here, I'm going to go ahead and go through them. It includes preparing teachers, school leaders, and specialized instructional support personnel.

Acquiring supplies, training, equipment, including technology, and educational materials, including developing and acquiring instructional materials. Carrying out necessary renovations to ensure that a new school building complies with applicable statutes and regulations, and minor facilities repairs, excluding construction. Providing one-time startup costs associated with providing transportation to students to and from the charter school.

Carrying out community engagement activities, which may include paying the cost of student and staff recruitment. And, providing for other appropriate non-sustained costs

related to the replication or expansion of high-quality charter schools when those costs cannot be met from other sources. Next slide.

So, a few additional notes. Grants awarded may be used for a period of, once again, not more than five years. Grantees may use not more than 18 months for planning and program design. Planning funds can be used, for example, for hiring and compensating teachers, school leaders, and specialized instructional support personnel, providing training and professional development to staff, or other critical activities that need to occur prior to opening.

Applicants may propose to only support one charter school per grant application. And also, funds can only be used for the grade level or levels included in the grant application. And please remember, you should read the funding restrictions in the applicable regulation section of the NIA thoroughly.

And for this competition, the maximum limit of grant funds that may be awarded per new replicated or expanded charter school is \$1,500,000. Next slide, please. So, once again, your costs need to be allowable, reasonable, and necessary.

So, you should ask, is it necessary to complete the project? Is it reasonable? Is it allocable? And is it allowable? So, please ensure that all costs that are included in your proposed budget take this into consideration.

Next slide. So, we will host a CSP Project Directors' meeting annually, and applicants approved for funding under this competition must attend the two-day meeting.

And it will be held in Washington, D.C. We encourage you to include the cost of attending this meeting in the proposed budget as an administrative expense. So, I mentioned before that there is a budget webinar that we pre-recorded, and it's available on the website.

And the link was just dropped into the chat as well. Next slide. All right, so then the project narrative. To facilitate the review of the application, please organize your project narrative in the following order and include a table of contents.

It should include the competitive preference priority, which is optional, if you choose to write to it, the selection criteria, and the application requirements. So, the recommended page limit for the project narrative is 50 pages. And the table of contents and any attachments, and we'll be going through attachments later in the presentation, do not count against the page limit, but this is a recommended page limit.

All right, so we are going to pause again to take your questions about the content that I just reviewed. Thanks. And we're back. So, I'm going to go through a few of the questions that we received, and then some of the other questions will be answered in information that we're going to share.

So, the first one is, our current proposal specifies that one grade will be added each year. Can we apply for an expansion grant each year? So, no, you would not apply for an expansion grant each year, you would apply for this grant, and you would apply for it for up to five years.

And so, you would include that in your proposed budget, so the costs associated with each year that a grade level will be added. May the same applicant submit more than one application if applied on behalf of different charter schools? No, an applicant can only submit one application.

Let's see. So, can planning funds be used to retroactively pay leaders if leaders have been documenting unpaid hours? No.

And this actually ties to one other question that I'll touch on, it was a question on when would funds be dispersed or be available. And it would be on October 1st. So with that, I'm going to hand it off to Porscheoy Brice. Thanks, Porscheoy.

- [Porscheoy] Thanks, Stephanie. So, good afternoon, everyone. I will now talk about the various components of the application. As you've heard repeated throughout the presentation, for full details, please review the NIA. Next slide. Okay, great. So, in this year's FY 2022 developer competition, the department only has one CPP, as Anna mentioned during the beginning of the webinar.

Although the NFP establishes two priorities for consideration in future developer competitions, in FY 22, the administration has opted to use only one of the two priorities. And that priority is promoting high-quality educator and community-centered charter schools to support underserved students. This will include a proposal to open a new charter school, or to replicate or expand a high-quality charter school that is developed and implemented with meaningful and ongoing engagement, with current or former teachers or other educators, and using a community-centered approach.

Applicants must also provide a high-quality plan that demonstrates how its proposed project will meet the requirements. As noted here on the screen, CSP will award up to five points to an application, and that's depending on how well the application meets the priority.

Next slide. So, given the novice nature of the developer applicant pool, coupled with the limited amount of time available to applicants to pull together the applications, in this year's competition, the charter-traditional school district collaboration is an invitational priority for applicants. Invitational meaning that applicants do not receive points for addressing this priority.

As noted earlier in the presentation, those applicants that do address the priority will not be given a competitive advantage over other applicants. The main utility of the invitational priority is to shed light on the potential for use in future competitions and to learn more from the field. As previously mentioned, the Biden-Harris administration committed to

never using the charter-district priority as an absolute priority or requirement for applicants during this term and future competitions.

The administration will only ever consider using the charter-district collaboration priority as an invitational or competitive preference priority. And this invitational priority calls for collaboration between charter schools and traditional public schools or districts that benefit students and families across schools, which include but are not limited to co-developed or shared curricular and instructional resources, professional development opportunities, evidence-based practices to improve academic performance for underserved students as well.

Next slide. So, in addition, an applicant must also provide a description of the collaboration that describes each member of the collaboration, states the purpose and duration, describes the anticipated roles and responsibilities of each member, describes how the collaboration will benefit one or more members of the collaboration, describes the resources members will contribute, and any other relevant information.

And finally, within 120 days of receiving an award or within 120 days of the date the collaboration is scheduled to begin, whichever is later, provide evidence of participation in the collaboration, which may include but is not required to include a memorandum of understanding. Now, the selection criteria.

So, here are the selection criteria that will be used for B and E grants respectively and the potential points. As discussed earlier, the quality of the charter school's management plan is a new criteria for this competition, and, again, full details can be found in the NIA. So, here's an example chart that demonstrates the maximum points and the range of points that may be provided based on the quality of the applicant's response.

Shown to the right are suggested point ranges for an evaluation of fully developed, well developed, adequately developed, poorly developed, or not addressed for each of the selection criteria. Next slide. Sorry. Next slide. Okay.

So, now discuss application requirements that applicants for grants under ALN 84.282B or 84.282E must address. So, applications must describe the eligible applicant's objectives in running a quality charter school program and how the program will be carried out, including how the eligible applicant will ensure the charter school is receiving funds under the program meet the educational needs of their students, the roles and responsibilities of eligible applicants, partner organizations, and charter management organizations.

The quality controls agreed to between the eligible applicant and the authorized public chartering agency involved. How the autonomy and flexibility granted to a charter school is consistent with the definition of a charter school in Section 4310 of ESEA. 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 grant.



The eligible applicant's planned activities and expenditures of grant funds to support the activities. And how the eligible applicant will support the use of effective parent, family and community engagement strategies to operate each school. And finally, how the eligible applicant will ensure that each charter school receiving funds under this program has considered and planned for the transportation needs of the school students.

Again, I just want to note that more details can be found in the NIA. All right, so now we are at description of the educational program. So, applicants must describe the educational program that the applicant will implement, including how the program will enable all students to meet the challenging state academic standards, grade levels or ages of students who will be served, and the instructional practices that will be used.

All right. So, for additional descriptions, how the applicant will ensure that the charter school that will receive funds will recruit, enroll, and retain students.

Must also describe the lottery and enrollment procedures that the applicant will use for the charter school if more students apply for admission than can be accommodated. And if the applicant proposes to use a weighted lottery, how the weighted lottery complies with Section 4303 of the ESEA. Must also provide a complete logic model for the grant project, provide a budget narrative that is aligned with the activities, target grant project outputs, and outcomes described in the logic model, and that outlines how the grant funds will be expended to carry out planned activities.

And also, if the applicant proposes to open a new charter school, which is ALN number 84.282B, or proposes to replicate or expand a high-quality charter school, 84.282E, that provides a single-sex educational program, demonstrate that the proposed single-sex educational programs are in compliance with Title IX of the Education Amendments of 1972 and its implementing regulations, including 34 CFR.

All right. Applicants must also provide the most recent independently audited financial statements. These must be prepared in accordance with generally accepted accounting principles. A request and justification for any waivers that the eligible entity believes are necessary. A description of any state or local rules that will be waived or will not apply.

And a description of how each school that will receive funds meets the statutory definition of a charter school. All right. So now moving on to our new for-profit management contract requirement. As noted throughout, more details are in the NIA.

But for any existing or proposed contract with a for-profit management organization, including a non-profit management organization operated by or on behalf of a for-profit entity without regard to whether the management organization or its related entities exercise full and substantial administrative control over the charter school or the CSP project, the applicant must provide the following information or equivalent information that the applicant has submitted to the authorized public chartering agency.

That includes a copy of the existing contract with the for-profit management organization, or a description of the terms of the contract, a description of any business or financial relationship between the charter school developer and the management organization, the name and contact information for each member of the governing board of the charter school, along with other key information as seen on the slide and in the NIA.

A description of how the applicant will ensure that members of the governing board of the charter school are not selected, removed, controlled, or employed by the for-profit management organization. An explanation of how the applicant will ensure the management contract is severable. And a description of the steps the applicant will take to ensure that it maintains control over all student records and has a process in place to provide those records to another public school or school district in a timely manner upon the transfer of a student from the charter school to another public school.

And finally, applicants must also provide the name and address of the authorized public chartering agency, a copy of the approved charter, or in the case of an applicant that has not yet received an approved charter, a copy of the charter application that was submitted, documentation that the applicant has provided notice to the authorized public chartering agency, and a proposed budget.

Next slide, please. All right, and then, what you'll see on the slide here are additional requirements specific to 84.282E. For the sake of time, I won't go over them in detail, but this, again, will be shared. Okay, moving on to the assurances.

So, applicants for CSP developer grants must provide the following assurances. And these assurances are from Section 43 of the ESEA, and these include that each charter school receiving funds through this program will have a high degree of autonomy over budget and operations, including autonomy over personnel decisions, that each eligible applicant will support charter schools in meeting the educational needs of their students, and that eligible applicants will ensure that each charter school receiving funds under this program makes publicly available, consistent with the dissemination requirements of the annual State report cards under Section 1111(h) of the ESEA, including on the school's website.

Next slide, continuing with assurances. Applicants for developer grants will have to provide the following assurances, and these come from the 2022 NFP. And you can see those on the screen here. And for the sake of time, for the next slide as well, it goes over it in more detail.

And here, it's what we posted on the website on the annual basis, a copy of any management contract and what that will have to include. So here, again, as earlier, this reiterates that each applicant must provide an assurance that it will hold or participate in a public hearing.

Again, noting that we understand that the process may exceed the 18-month planning period and what's in place for that. Also, that each applicant has to provide assurance that

it will not use implementation funds until after it has received a charter from an authorized public chartering agency as well. And now, we will move on to this slide here, which covers the definitions as included in the NIA, and for more details, you can definitely find that there.

Next slide. So, on this slide, you will find the Government Performance and Results Act performance indicators that the secretary has established to measure annual progress toward achieving the purposes of the program, and these are the number of charter schools in operation around the nation, and the percentage of fourth and eighth-grade charter schools who are achieving at or above the proficient level on state assessments in mathematics and reading language arts, as well as the federal cost per student in implementing a successful school as defined as a school in operation for three or more consecutive years.

And this is information that grantees will then provide on the Annual Performance Report, which we refer to as the APR. So, in addition to the GPRA measures that I just went over, applicants must also propose project-specific performance measures and targets that are consistent with the objective of the proposed project. So, it's covered here.

Continuing on to the next slide. This is, again, information that grantees will submit annually as part of the APR. So, if you determine that you will be unable to report annually on a certain measure, it shouldn't be included. And, again, there is additional information here that provides resources for those who may need technical assistance.

Okay. Now, we'll discuss other attachments. So, here, all appendices should be attached to the other attachments form. Also, I want to note that these must be in either PDF read-only, not encrypted, or Microsoft Word, and the application package has complete details and guidance to help with this.

Moving on to the next slide. Here's a list of the other attachments. I just want to note that substantive project-related information that you wish for peer reviewers to consider should not be included here. These should be included in the project narrative form and budget narrative form sections. Next slide.

So, specifically for Appendix E, school operated by application... Sorry, a school operated by applicant, this information should include the school name, grade levels, location, whether the school holds a separate charter, and authorizer for each school operated or managed by the applicant. Next slide.

Additional notes. So here, what you see on the screen is about open licensing. And so, under an open license, the public is given permission to access, reproduce, and publicly display, and distribute the copyrightable work. So, more information is provided here about open licensing.

You can also find that in the NIA. Next, we have the applicable regulations and statutes that provide the authority for the eligibility in application requirements, priorities, definition, and selection criteria presented in the presentation today as well as in the NIA.

This is where we're drawing from. Next slide. All right, and so for award notices, if the application is successful, we will notify your U.S. representative and U.S. senators, and send you a grant award notification, which we refer to as a GAN. And if your application is deemed ineligible or not selected for funding, you will be notified via USPS mail.

And at this time, I'm going to pause for any questions that you may have. I'm back. So just to answer some of the questions. First up we have, can we apply for a charter starting in 2023? So, that one gets into a number of factors, that one will be a good one to bring back up next week during Office Hours.

As far as staff salaries were allowed before, are they still allowable expenses? The answer is yes. Next, if we purchase an existing school building, our renovation costs the same as construction, therefore, not allowed. And that gets into a question as well about minor facility repairs. And the answer is that CSP funds may be used for necessary renovations to ensure that a new school building complies with applicable statutes and regulations and minor facility repairs excluding construction.

So, to the extent that a payment is required for an allowable activity, for example, minor renovations, then the cost of the permit also would be allowable. So, final question gets into allowable evidence we need for the project and if we can provide specific examples of that.

So, there's no requirement specific to an allowable evidence or anything like that, we really leave that to the applicant's discretion. Some things that you may want to consider when speaking to that is feedback that you've gotten from parents or others in the community, or waitlist and things along those lines to really try to address this.

So, at this time, I'm going to turn it over to my colleague, Leslie, to see us through the rest of the presentation.

- [Leslie] Thank you, Porscheoy. Good afternoon, everyone. In this slide, we're now going to discuss submitting your application. Next slide, please. There is an electronic submission requirement. Application for grants under this program must be submitted electronically, unless you qualify for an exception to this requirement in accordance with the instructions in the notice.

Next slide, please. Now, we are going to discuss using grants.gov. Next slide, please. This is a reminder that applications are due August 5th, 2022 at 11:59 p.m., Eastern Time. An important note is that the grants.gov helpdesk is not available on weekends.

You are strongly encouraged to submit your application early. And you can always resubmit your application prior to the closing date, August 5th, 2022 at 11:59 p.m., Eastern time, if you need to update your application.

Next slide, please. Within the application notice, you will find information, such as the due date and time, program contact information, page limits, recommended and formatting, allowable file types, mandatory or optional electronic submission, exemptions to mandatory electronic submission, and the system for submitting.

Regarding allowable file types, please ensure that only U.S. Department of Education approved file types are attached. Please see the NIA for a detailed description of these files, read-only, non-modifiable PDF files. Also, please do not upload any password-protected files to your application.

Lengthy file names could result in difficulties with opening and processing your application. We recommend that your file name be less than 50 characters. Next slide, please.

Grants.gov. Grants.gov is an external application system used throughout the federal government. Next slide, please. The registration process is to, number one, register with SAM to obtain your Unique Entity Identifier, or UEI.

Number two, set up your authorized organization representative, or AOR, profile. Number three, get authorized as an authorized organization representative by your organization's e-Biz POC.

Number four, track your authorized organization representative status. Next slide, please. An important reminder is that the complete grants.gov registration process takes up to four weeks to complete. You do not have to register with grants.gov if you only want to find grant opportunities or to download application packages, but you must submit to register.

No, but you must register to submit, excuse me. Next slide. Grants.gov submission tips. Please review the grants.gov submission procedures and tips for applicants in the application package. The applicant must download the correct version of Adobe in order to read any grants.gov application packages.

In Adobe, applicants must move all mandatory forms from left to right in order to open each form. Once the form is on the right side, the applicant can complete and save each form. While in process, the application package is saved offline. Press the final Save and Submit button before the final submission of the application.

Once you download the application, multiple people can work on the application, and you work offline. Please save often. Include both forms and attachment. Please submit all documents as PDF files.

Once the application is complete, the Save and Submit button becomes active. And lastly, users may resubmit an application at any point up until the closing date and time. We will review the most recent submission before the due date and time. Next slide, please.

In this slide, we will discuss a successful and unsuccessful submission. For a successful submission, number one, applicants should receive a confirmation email with a time and date stamp, and an assigned tracking number from grants.gov. Number two, for a successful submission, applicants should receive a validation email from grants.gov.

This means the application is ready for department pickup. Number three, the applicant should receive an email with their assigned PR award number. Now, for an unsuccessful submission. Number one, applicants should receive a confirmation email with a time and date stamp, and an assigned tracking number from grants.gov.

Next, for an unsuccessful submission, if the application is received after 11:59 p.m., Eastern Time on August 5th, 2022 or validation is not successful, the applicant should receive an error email. The email may list the error, or the applicant can use their tracking number to find the submission error.

Next slide, please. Here, we're going to be talking about verifying and tracking your submission. You should check and verify that the submission is on time and validated successfully.

Number two, to check, please log into grants.gov and click on the Track My Application link. Number three, the date and time received should be earlier than 11:59 p.m. on August 5th, 2022.

Number four, the application status should be Validated. And lastly, please do not rely solely on email to confirm whether your application has been received on time and validated successfully. Next slide. Here, we will discuss some submission tips, and they are, to please save a copy of your application.

We may request original signatures on forms at a later date. Applications cannot be unsubmitted. Users may resubmit their application at any point up until the closing date and time. We review the most recent submission before the due date and time. Next slide.

Grants.gov availability. If you are experiencing problems submitting your application through grants.gov, please contact the grants.gov support desk at 800-518-4726. You must obtain a grants.gov support desk case number and must keep a record of it.

If you are prevented from electronically submitting your application on the application deadline date because of technical problems with the grants.gov system, we will grant you an extension until 11:59 p.m., Eastern Time the following day to enable you to transmit your application electronically, by hand delivery, or through the mail, following the instructions in the NIA.

And please, if you submit an application after 11:59 p.m., Eastern Time, Washington, D.C. time, on August 5th, 2022, please contact the person listed in the notice and provide an explanation of the technical problem you experience with grants.gov along with the grants.gov support desk case number. We will accept your explanation if we can confirm that a technical problem occurred with the grants.gov system and that a problem affected your ability to submit your application by the deadline.

The department will contact you after a determination is made on whether your application will be accepted. These extensions apply only to the unavailability of or technical problems with the grants.gov system. We will not grant you an extension if you fail to fully register to submit your application on grants.gov before the application deadline date and time or if the technical problem you experienced is unrelated to the grants.gov system.

Next slide. We are now going to discuss the application review process. During the application review process, there is, first, the eligibility review. Before making awards, ED will screen applications submitted in accordance with the requirements in the notice to determine whether applications have met eligibility and other requirements.

This screening process may occur at various stages in the process. Applicants that are determined to be ineligible will not receive a grant regardless of peer reviewer scores or comments. Next is the peer review. During this stage, applications are evaluated by a three-person non-federal panel.

Each reviewer individually reads, evaluates, and scores their assigned application based on the selection criteria listed in the notice. The panel is given time to discuss the application as well as their respective scores and comments.

The three reviewer scores are then averaged to create an overall application score. After the peer review, the rank order is created. The rank order list is prepared based on the overall application scores.

ED uses this list to estimate how many applications will be funded based on rank order score. Finally, prior to making final awards, OESE in consultation with OHEC and other offices as appropriate will work together to develop funding recommendations and identify any special terms and conditions that may be needed.

Following the vetting of the highest rated applications, the competition manager will prepare and submit a funding slate to the secretary for review and approval. Next slide, please. Important reminders for applicants.

The following are some important reminders and key dates as you plan your application process. We strongly encourage each potential applicant to notify us of their intent to apply to [DevelopCompetition2022@ed.gov](mailto:DevelopCompetition2022@ed.gov), with Fiscal Year 2022 CSP Developer Intent to Apply in the subject line, by July 21st, 2022.

Applicants that do not send a notice of intent to apply may still apply for funding. The federal government has transitioned away from the DUNS number to registering via SAM.gov. The deadline for transmittal of applications is August 5th, 2022 at 11:59 p.m., Eastern Time. There are two other recorded pre-award webinars that can support you in writing a high-quality application.

One webinar focuses on developing a budget that aligns with your application, and the other webinar focuses on creating logic models and SMART performance measures. All of these webinars are available on the National Charter School Resource Center website.

Office Hours for developer applicants will be Monday, July 18th, 2022 at 3:30 p.m., Eastern Time. Next slide, please. Now, before we get into questions and answers, I would like to note that in the upper-right corner of the slide is the registration link for Office Hours.

And also, please note the CSP contact information and the information for grants.gov in this slide. After any questions, we will transition to the director of the Charter Schools Program, Dr. Anna Hinton.

- Thank you so much, Leslie. In the interest of time, because we are over, I would ask that you please go ahead and submit your questions in the chat, utilizing the chat box. We will take those questions and reconsider them and respond to them during the Office Hours webinar on Monday, which will be devoted solely to responding to all of the questions that we have not been able to answer, either on these webinars or questions that we've received following these webinars.

I'd also like to just thank you for your time. My final ask is that you please complete the survey to give us feedback on how we did today. And, again, would encourage you to register and submit questions for us to address on next Monday, July 18th. Again, to the extent that you can get us those questions ahead of time, it really will position us to be as responsive as possible to answering your questions.

With that, thank you again so much for hanging in there with us. Sorry for going over, and look forward to the follow-up conversation on Monday. Thank you. Take care.