



# COMMUNITIES OF EXCELLENCE

## IDAHO'S CHARTER SCHOOLS PROGRAM GRANT

### REQUEST FOR APPLICATIONS

2021 Federal CSP Subgrant

**APPLICATIONS DUE: [Friday, April 9, 2021 5:00 PM MST]**



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Please note this update to the instructions on page 25:

- Project Narrative is limited to 25 pages (not including cover page or Executive Summary)
- Board Members will not be required to submit a Conflict of Interest form

\* For the 2021 Competition "current eligible schools" in this document refers to schools that opened in 2020 or have authorizer-approved charters to open in the fall of 2021, or 2022.

[www.bluum.org/idaho-csp-grant/](http://www.bluum.org/idaho-csp-grant/)

COMMUNITIES OF EXCELLENCE - IDAHO'S CHARTER SCHOOLS PROGRAM

2021 CSP SUBGRANT RFA

<b>Federal Program Title:</b>	Expanding Opportunities through Quality Charter Schools Program (CSP) to State Entities
<b>Federal Agency:</b>	U.S. Department of Education
<b>State Entity:</b>	Bluum
<b>CFDA Number:</b>	84.282A
<b>Award Name:</b>	Idaho's Communities of Excellence
<b>Award Number:</b>	U282A180005

COMMUNITIES OF EXCELLENCE - IDAHO'S CHARTER SCHOOLS PROGRAM

2021 CSP SUBGRANT RFA

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## 2021 Timeline

DATE	EVENTS & ACTIVITES
Mon, Feb 22	Introductory Technical Assistance Webinar
Mon, Mar 1	Open RFP
Mon, Mar 1	Charter School Training (Virtual and On Demand)
Fri, Apr 9	RFP Close
Fri, Apr 30	Reviews Finalized
Fri, May 7	Management Review Completed
Mon, May 10	Terry Notify Schools via Personal Note
May 17 - 21	Schedule Individual Completeness Check w/ Budget Training
Fri, May 14	Official Notice of Awards - first day expenses can be incurred
Tues, Jun 1	\$ Begins to be Disbursed to Sub Recipients



Grant calendar updates can be found at [www.bloom.org/idaho-csp-grant](http://www.bloom.org/idaho-csp-grant)

**Dates are subject to change.**

## BACKGROUND

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) with the purpose “to expand opportunities for all students, particularly traditionally underserved students, to attend public charter schools and meet challenging State academic standards; provide financial assistance for the planning, program design, and initial implementation of charter schools; increase the number of high-quality charter schools available to students across the United States; evaluate the impact of charter schools on student achievement, families, and communities; share best practices between charter schools and other public schools; encourage States to provide facilities support to charter schools; and support efforts to strengthen the charter school authorizing process.”

The CSP State Entities program provides financial assistance to State Entities to support charter schools that serve elementary and secondary school students in a given state. Under the program, recipient State Entities make subgrants to eligible applicants for the purpose of opening new public charter schools and replicating and expanding high-quality public charter schools. Grant funds may also be used to provide technical assistance to eligible applicants and authorized public chartering agencies in opening new charter schools and replicating and expanding high-quality charter schools, and to work with authorized public chartering agencies to improve authorizing quality, including developing capacity for, and conducting, fiscal oversight and auditing of charter schools. Public charter schools receiving subgrant funds under the CSP State Entities program also may serve students in early childhood education programs or postsecondary students.

The consortium of partners that has come together around **Idaho's Communities of Excellence** federal CSP project successfully secured a federal Charter Schools Program grant in 2018 to lead the expansion of high-quality public charter schools across the state. Bluum, a Boise-based statewide nonprofit charter school support entity, is project lead. Bluum is organized to seek out, vet and support innovative leaders and high-performing school models. Bluum is joined by Idaho's primary charter school authorizer the Idaho Public Charter School Commission (PCSC), long-time leaders in Idaho education and school improvement efforts, Idaho State Board of Education and the J.A. and Kathryn Albertson Family Foundation, and the nationally-renowned non-profit charter school facilities finance group Building Hope.

## PURPOSE OF THE PROJECT

Bluum, on behalf of **Idaho's Communities of Excellence** project, has received a competitive grant under the federal Charter Schools Program for 2018-2023 in the amount of \$17,111,111 to enhance stakeholders' capacity to expand opportunities for students to attend excellent charter schools that meet and exceed state academic standards. Idaho's Communities of Excellence project has three objectives to carry out within Idaho:

- Increase the number of quality charter school seats by 8,200 students, especially for our most educationally disadvantaged and rural students, through start-up, replication and expansion.
- Support the PCSC in expanding its quality authorizing efforts while disseminating and supporting best practice for other authorizers statewide.
- Evaluate and disseminate widely the successes and lessons of high-quality charter schools to impact the broader education system.

In carrying out these objectives, **Idaho's Communities of Excellence Charter Schools Program** will provide subgrants to qualified charter school developers to provide financial support for the initial implementation of expanding, replicating, or opening a public charter school.

At least 90 percent of Idaho's federal CSP award will be utilized for competitive subgrants to eligible charter school subgrantees. At least seven percent will be utilized for state-level technical assistance activities and program evaluation/research, of which three percent is designated to the Idaho Public Charter School Commission for technical assistance and new school supports. Finally, not more than three percent will be utilized by Bluum for the purposes of administering the program.

**AVAILABLE FUNDS FOR SUBGRANTS**

The current funding amount available to be awarded in 2019 for **Idaho's Communities of Excellence Charter Schools Program** subgrants is approximately \$9,600,000<sup>1</sup> which will be divided into three categories based on applicant eligibility<sup>2</sup> to carry out one of the following eligible subgrant activities (per ESEA § 4303(b)(1) requirements):

- a) open and prepare for the operation of new charter schools;
- b) open and prepare for the operation of replicated high-quality charter schools; or
- c) expand high-quality charter schools.

The available funds for this 2019 Request for Applications (RFA) will be divided and awarded to successful applicants as follows:

Type of Subgrant	March 2019 Awards	March 2019 Funds Available	October 2019 Awards	October 2019 Funds Available
Start Up Grants	3	\$2,400,000	2	\$1,600,000
Replication	2	\$1,600,000	2	\$1,600,000
Expansion	1	\$800,000	2	\$1,600,000

<sup>1</sup> \$8,130,000 of this has been confirmed, with the second year of funding for October 2019 application award contingent on Federal approval of 2020/21 funds.

<sup>2</sup> See subsequent "Eligible Applicant" section for eligibility requirements for each applicant category.

## SIZE AND DURATION OF SUBGRANTS

Idaho's Communities of Excellence Charter Schools Program subgrants are designed to be for a period of up to 18 months for planning and 24 consecutive months for implementation activities leading up to and following the opening of a new school, replication school, or expansion project. Award recipients will be limited to a planning period of up to 18 months.<sup>3</sup> The total up to 42 month award amounts and distribution breakdown by subgrant year, are as follows:

### SUBGRANT AMOUNTS BY SUBGRANT YEAR

Grant Year	First Year	Second Year	Total Award
March 2019 Awardees	\$525,000	\$275,000	\$800,000
October 2019 Awardees	\$555,000	\$245,000	\$800,000
October 2020 Awardees	\$526,074	\$298,926	\$825,000
October 2021 Awardees	\$425,565	\$411,935	\$837,500

CSP subgrants are awarded on a competitive basis according to score on the Selection Criteria rubric identified in this RFA. There is no guarantee that submitting a proposal will result in funding, or funding at the requested level. Proposals that do not reach a minimum score overall will not be funded.

CSP subgrants are subject to an annual renewal process. The renewal process to continue grant funding is not competitive but is subject to available federal funds. After the conclusion of the first year within the approved project period, the subgrantee shall submit all required documentation, including the annual performance report and financial expenditure report. Satisfactory progress toward meetings the goals and objectives stipulated within the grant will be required in order to renew the grant for a second year.

Continuation funding may be terminated if substantial progress is not being made to accomplish the grant project goals articulated in the awarded CSP subgrant application or if the charter school fails to make satisfactory student academic progress. Failure to draw down funds in a regular and timely manner, fulfill technical assistance and reporting requirements, or meet enrollment projections by a significant amount may potentially disrupt funding. Regular communication regarding changes in plans, administration, or ability to fulfill obligations of the grant is encouraged to identify early solutions.

<sup>3</sup> A total up to 42 month subgrant is within the federal limit for the length of the total subgrant period under ESEA § 4303 (B), as is the limit of up to 18 months on the length of the planning phase.

## ELIGIBLE APPLICANTS (REQUIRED CRITERIA)

In order to apply for this federal CSP Subgrant, applicants must be approved by an Idaho state-sanctioned charter school authorizer as a:

- **New Charter School** – approved and in their first year of operations.
- **Replication of a High-Quality Charter School** – open a new charter school or campus based upon the educational model of an existing high-quality charter school.
- **Expansion of a High-Quality Charter School** – significantly increase enrollment or add one or more grades to a high-quality charter school.

In order to be eligible to apply for this federal CSP Subgrant, applicants must:

- Meet the federal definition of a “charter school,” in accordance to ESEA § 4310 (2) A – M (see below).
- Have applied for and received authorization to operate as a charter school from an authorized Idaho public chartering authority and have provided adequate and timely notification to that authority that the school is applying for **Idaho’s Communities of Excellence Charter Schools Program** subgrant.
- Seek to serve a representative student population by seeking to achieve a combined average of non-white, English Language learner, special needs, and economically disadvantaged students that is no less than five percent below the local representation for this combined group.
- Confirm compliance in the “Compliance Check List.”
- If replication or expansion, provide academic data showing scores higher than the state averages for ELA and Math for growth and proficiency, as defined by ESSA.
- Virtual charter schools are not eligible to apply.

There is an eligibility checklist that an applicant must verify before gaining access to the RFA Application and associated tasks in Bluum’s Online Portal. This is to ensure the above required criteria are met.

## REQUIRED ELEMENTS

Each applicant must convince the grant review team that the proposal will result in a quality educational program. Special 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 and enhanced levels of student academic achievement as measured by Idaho's state assessment system.

The CSP subgrant application is structured to parallel the Idaho Public Charter School Commission's charter school petition structure and serve as a school's business plan for the project; therefore, schools should ensure that all the required elements accurately reflect the unique attributes of their schools. Any application that has been plagiarized in whole or in part, or lacking in uniqueness/innovation may be denied. Applicants should ensure the application is unique and are encouraged to pay special attention to justifying the need in the community and the level of buy-in from the community.

## FEDERAL DEFINITION OF A CHARTER SCHOOL

All applicants of **Idaho's Communities of Excellence Charter Schools Program** subgrant must demonstrate they meet the following federal definitions of a "charter school" and "developer" in the Elementary and Secondary Education Act of 1965 (ESEA), as amended by the Every Student Succeeds Act (ESSA), sections 4310 (2) and 4310 (5), in order to be eligible for federal Charter Schools Program funds.

ESEA § 4310 (2) CHARTER SCHOOL—The term "charter school" means 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.

ESEA § 4310 (5) DEVELOPER – The term “developer” means 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.

### **New Charter School Defined**

For the purposes of this federal CSP Subgrant, Bluum defines a new charter school as either a new start-up school that did not previously exist or a conversion school that is a public school that has substantially changed its curriculum, staff and/or school design, either voluntarily or involuntarily, in order to increase student academic performance as part of a turnaround process. A developer for a new charter school must have opened within the past year (Fall 2018) or been approved by a charter school authorizer to open in Fall 2019 or Fall 2020.

Schools that have received a federal CSP grant or subgrant under another school name or before being reconstituted are not eligible for funding under **Idaho's Communities of Excellence Charter Schools Program**, unless they meet the expansion definition below.

**High-quality for start-up schools**

- Evidence of a committed board of trustees that own the charter school process and have the demonstrated capacity to deliver for children and families.
- Identified quality instructional leader who is either experienced or proven in running a high-performing school and/or has received first-class charter specific training.
- Demonstrated ability to attract, recruit, retain and develop top teaching talent.
- Sustainable business plan.
- Well-conceived facility plan.
- Evidence of market-demand for the school.
- Innovative and effective learning model that meet the needs of disadvantaged and/or rural students.
- Defined and clear transportation plan for students.

**Replication or Expansion of an existing High-Quality Charter School**

Applicants seeking a Replication or Expansion award will be expected to meet the federal definition of a "High-Quality Charter School", including demonstrating the following in their application, to be eligible for a Replication or Expansion subgrant award:

- Evidence of strong academic results, including above state average growth and proficiency on ISAT.
- No significant issues identified by authorizer in areas of student safety, school finance, operational management, or statutory/regulatory compliance.
- Success in significantly increasing student achievement, including graduation rates, for all students and for each subgroup defined by ESSA (e.g. economically disadvantaged, students with disabilities, Hispanic or Latino, and ELL).
- Good standing with authorizer and lenders.
- Evidence of a student waitlist.
- Evidence of strong and stable leadership and governance.

**Replication of a High-Quality Charter School:** Replicate 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 additional charter.

**Expansion of a High-Quality Charter School:** Expand means an increase in the student count of the existing school by more than 250 students or at least two grade levels over the course of the subgrant.<sup>4</sup>

ESEA § 4310 (8) HIGH-QUALITY CHARTER SCHOOL —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.

ESEA § 4310 (9) REPLICATE.—The term “replicate”, when used with respect 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.

ESEA § 4310 (7) EXPAND. —The term “expand”, when used with respect to a high-quality charter school, means to significantly increase enrollment or add one or more grades to the high-quality charter school.

### **Educational Service Providers Defined**

Schools choosing to engage a for-profit or nonprofit educational service provider (ESP) or educational management organization (EMO) or charter management organization (CMO) must demonstrate that they and their governing boards are independent of the provider, and that all fees and agreements are fair and reasonable. The ESP, EMO or CMO does not qualify as an

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<sup>4</sup> Evidence of strong academic results, including above state average growth and proficiency on ISAT to indicate that three years of improved academic results, are required for expansion applicants that have previously received federal CSP funding through either a subgrant under a state-run program or a direct federal CSP grant. Additionally, per ESEA §4303 (e) (2), previous CSP recipients must demonstrate the newly-sought CSP subgrant does not duplicate the same activities covered under the earlier CSP award.

eligible applicant nor may it hold or manage a subgrant awarded to a school. Schools must exercise special care to ensure that a direct representative of the applicant school, independent of the ESP, EMO or CMO, is identified to administer the grant, as required per 34 CFR 74.40-48, 75.524-525, and 80.36 (procurements) and articulated in the federal CSP January 2014 Nonregulatory Guidance (see links "Regulations and Guidance" section below). Contracts between schools and ESPs will be subject to review as part of the application and eligibility processes per ESEA § 4303 (f)(1)(C)(i)(I).

## 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 Nonregulatory 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: 2015 Notice of Final Priorities, Requirements, Definitions, and Selection Criteria; Charter Schools Program Grants to State Educational Agencies ([80 FR 34201](#)).
- 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 (Nonprocurement) in 2 CFR part 180, 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).
- And other programmatic guidance identified on the [federal Charter Schools Program website](#).

## LOTTERY AND ENROLLMENT REQUIREMENTS

A charter school receiving CSP funds must use a lottery if more students apply for admission to the charter school than can be admitted. A charter school with fewer applicants than spaces available does not need to conduct a lottery. A lottery is a random selection process by which applicants are admitted to the charter school, as per ESEA § 4303 (c)(3)(A).

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 the lottery on this basis:

- a) Students who are enrolled in a public school at the time it is converted into a public charter school;
- b) 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;
- c) Siblings of students already admitted to or attending the same charter school;
- d) 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
- e) 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.” 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, or sex, or against students with disabilities; in order 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

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lottery if, as of the application closing date, 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 admissions 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 the State'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.
- 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.

### Use of Funds

Idaho's Communities of Excellence Charter Schools Program is a reimbursement program, which means recipients will be reimbursed following proof of expenditures on allowable, approved activities.

The CSP subgrant purpose is to provide financial support for the initial operations of an expanding or newly established charter school. Subgrants can only be used for costs associated with expanding, replicating, or opening a public charter school. Subgrant activities refer to only those activities that occur during: a) planning period of up to 18 months; or b) the first-year or

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second year implementation of a new school or school expansion cohort. Grant expenditures for implementation are limited to 24 consecutive months.

Under the allowable activities described in the ESEA § 4303 (h), grant funds must be used for the following:

- 1) Preparing teachers, school leaders, and specialized instructional support personnel, including through paying costs associated with –
  - a) Providing research-based professional development for teachers and other staff that includes national staff development standards (including travel costs for school leaders, staff, and school board to attend conferences and training, or visiting other charter schools); and
  - b) Hiring and compensating, during the eligible applicant's planning period specified in the application for funds, 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, or aligning curriculum).
- 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) Under ESEA § 4303(h)(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, and informing the community about the school.
- 6) Providing for other appropriate, non-sustained costs related to opening, replicating, or expanding high-quality charter schools when such costs cannot be met from other sources.
- 7) 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, and minor facilities repairs (excluding construction)."

## 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 ESPs, EMOs and 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 includes if projected enrollment is not met, technical assistance requirements are not completed each year, funds are not spent in a timely manner, and reporting 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.*

Awardees will be required to log in to Bluum's Online Portal to complete a self-assessment that will be reviewed by the Finance staff upon receiving and completing a signed grant contract.

## MONITORING

Bluum 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 will participate in:

**Desktop Review:** 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. Bluum 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.***

## PARTICIPATION, EVALUATION, & REPORTING

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.

## TECHNICAL ASSISTANCE

The important dates listed at the front of this application are provided to ensure all potential applicants receive adequate technical assistance to submit a high quality proposal. Subgrantees will be required to attend a variety of technical assistance options over the grant period that are intentionally designed to improve each school's chance of success.

In addition to posting all information, trainings, and tools relevant to the CSP subgrant application on Bluum's, the Idaho Public Charter School Commission's (PCSC), and other consortium partners' websites, all district authorizers, charter school developers, and charter support networks will receive direct notification of this funding opportunity through direct mailing. In coordination with consortium partners, we will conduct four in-person introductory Charter School Grant workshops annually across the state (see important dates above) to announce the CSP grant, to explain how to apply, and to answer questions. Further, we will conduct statewide webinars annually on the CSP subgrant opportunity.

Bluum will coordinate and offer Charter School Training to ensure that quality charter school developers and operators are able to learn about the opportunity to apply for funding through this project.

This project builds on the current work of the PCSC that includes:

- **New Charter Petitioner Guidance.** Although statute and administrative rule provide information regarding the required contents of a charter petition, petitioners often request additional guidance regarding the scope and nature of information their charters should include. The guide takes petitioners through the development of a high-quality charter petition in order to maximize their chances of approval.

- **Pre-Opening Guidance.** The PCSC's pre-opening guidance includes interactive project management tools, resources, and advice on topics ranging from employee recruitment to governance training, and a series of one-on-one meetings to exchange information and support.
- **New School Leader Orientation.** Many public charter schools hire administrators who have not previously worked in the charter school sector. They face new challenges as they adjust to leading not only a school, but a charter LEA. The PCSC offers written and in-person orientation materials to introduce new administrators to the role of the authorizer, charter-specific requirements and expectations, and resources available to support their work.

Further, the Idaho State Department of Education (SDE) provides a "Charter Start 101" workshop for prospective school leaders and board members. This annual workshop introduces new charter school leaders and board members to the SDE's federal program officers. These federal program officers explain legal and compliance requirements to new school operators. School administrators that participate in this annual meeting are registered for Idaho's "Consolidated Federal and State Grants Application" (CFSGA) portal. Through this portal charters can apply for federal funds, manage these funds, report on the funds as needed, and certify compliance with all appropriate rules and regulations. Through this training, CFSGA portal, and ongoing process, charter schools can access all federal Title dollars available to their students while ensuring they receive their commensurate share of federal support.

In addition to PCSC- and state-provided trainings and technical assistance, Bluum will coordinate technical assistance training throughout the year for both subgrantees and prospective subgrantees to address issues specific to the federal CSP grant and best practices for effective charter schools. Bluum will work with the PCSC and partner organizations that have staff capacity and expertise in providing effective direct technical assistance to schools.

All subgrantees will receive an onsite technical assistance and monitoring visit within the first 12 months of school operation to ensure activities occur as approved within the grant and for Bluum to gather information regarding future technical assistance. Additionally, prior to each subsequent fiscal year, the subgrantee will submit an annual progress report to Bluum delineating its progress against their performance agreement, and if necessary, will explain adjustments to its plans to ensure all outcomes and goals are met.

To protect federal dollars, failure to demonstrate progress towards benchmarks and targets may result in cancellation of grant and the return of misused or unspent funds. For those subgrantee schools failing to meet expected benchmarks and targets, Bluum, in cooperation and coordination with the authorizing agency, will provide technical assistance to support school improvement efforts. Bluum staff will provide ongoing technical assistance for all

subgrantees by phone, email, and in-person meetings to ensure fidelity 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 Amy Felton-Toth, Director of Federal Grants and Support, at [grantscsp@bluum.org](mailto:grantscsp@bluum.org) to set up an appointment.

## EVALUATION

Bluum will ensure that each eligible applicant that receives a subgrant under **Idaho's Communities of Excellence** 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.

## REPORTING

Bluum is required to track specific information as a part of its federal CSP grant.

Subgrantees will be required to:

- Join Bluum's **Communities of Excellence** mailing list. Multiple people from each school are encouraged to be on this list.
- Maintain a performance contract with Bluum – 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 **Communities of Excellence** project.
- Provide contact information for current board members, with officers identified, including a phone number and e-mail address for each board member.
- Notify Bluum 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 **Idaho Communities of Excellence 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 Bluum 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.

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- 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 Idaho Communities of Excellence 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 ten years of receiving a subgrant, grant funds must be reimbursed to Idaho Communities of Excellence project. An exception may be made for schools that convert status due to either federal or state law requirements for academic purposes.

## DATA PRIVACY

Bluum 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 Idaho's Communities of Excellence 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 Bluum's privacy and security policies and procedures.

## 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 panel selected through an application process. The Idaho Independent Peer Review Panel will be comprised of teams of two reviewers. These reviewers will receive training on the effective use of a Selection Criteria Rubric to rate potential subgrant proposals. Individuals selected as peer reviewers must be well informed regarding education, education policy, evaluation, and operations of public charter schools.

Each selected reviewer must sign an assurance regarding conflict of interest to ensure that all applications are reviewed in a bias-free manner. Reviewers will be required to recuse themselves from the evaluation of any application for which they have a perceived or real conflict of interest.

Using criteria listed within the Selection Criteria Rubric included in this RFA, review teams 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. Bluum staff will conduct the final

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review of all applications to ensure that applications comply with all requirements and will determine the final budget for each subgrant recipient after evaluating whether proposed activities are reasonable, allowable, and necessary.

### AWARD PROCESS & START DATE

Applicants and their authorizer will receive notification on the status of their application via email by Friday, May 10, 2019. 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, which will be held on Monday, May 20, 2019. 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 budget period for the initial year of the subgrant is upon final approval through September 30. The proposed grant project goals should reflect that timeframe. Subsequent year(s) will have a budget period of October 1 through September 30.

### SUBMISSION PROCESS & DEADLINE

Idaho's Communities of Excellence Charter Schools Program subgrant funds are distributed using one process. A charter school may submit only one application using Bluum's online portal.

Please note the CSP subgrant application deadline is 5:00 PM MST. Applications submitted late or incomplete will not be considered. Bluum 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 as complete and 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 5:00 PM MST on Friday, April 9, 2021 via Bluum's Federal CSP Application Portal.

The electronic version of the narrative should include all required components as one document, except for the associated tasks and appendices. Incomplete or late applications will not be considered. If you do not receive an email confirmation of receipt of your application

within 24 hours of the deadline, please email [grantscsp@bluum.org](mailto:grantscsp@bluum.org). Please add that email address to your online address book.

Original copies of the signed Certifications and Assurances document should be postmarked (via mail) by Monday, May 13, 2019, to: **Bluum 702 W Idaho St Suite 600 Boise, ID 83702**  
**ATTN: CSP Grant.**

## APPLICATION INSTRUCTIONS

After creating an online profile in Bluum's online application portal, there will be a list of tasks and supporting documents in addition to the application with project narrative. Bluum will provide technical assistance to applicants, as well as help desk support from the Survey Monkey Apply team. Please email [grantscsp@bluum.org](mailto:grantscsp@bluum.org) for additional details and /or with any questions or comments.

The tasks that will need to be completed along with the RFA are:

- Submit names of board members and their email addresses so they can receive an email with an online **Conflict of Interest Form** to complete within the portal. (Applications will not be able to be submitted as complete until all conflict of interest forms are received. Applicants can log in to the system to resend the requests and monitor the completion.)
- Complete a request to the state sanctioned authorizer to fill out a **Letter of Good Standing** in Bluum's online portal. (Applications will not be able to be submitted as complete until the Letter of Good Standing is received. Applicants can log in to the system to resend the requests and monitor the completion.)
- Complete a **registration to join** the Bluum Communities of Excellence mail list for the school leader and a board representative.
- All pages must be standard letter size (8.5" x 11").
- Use 12-point Times New Roman, Arial, or Calibri font, double line spacing, and 1-inch margins. Tables may be in an 11-point font.
- Executive summary not to exceed one page double spaced.
- The narrative must address, in sequence, each section of part II identified in the **CSP Grant Selection Criteria and Evaluation Rubric**. State each part, section number, and title in bold.
- Budget Narrative not to exceed one page doubled space.
- **Budget** should be submitted in Microsoft Excel format if possible.
- Number all pages.
- Do not use a table of contents page or divider pages.

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- **Certification and Assurances** must include original signatures.

**PLEASE NOTE:** Do not attach curriculum, invoices, or any other document not specifically required as an attachment. If, for good cause, the applicant wishes to include an additional attachment, email [grantscsp@bluum.org](mailto:grantscsp@bluum.org) with your request for permission and a supporting rationale. Extraneous attachments, without proper authorization, will be removed and not submitted to the grant reviewer. Do not include cover pages for the attachments. Do not upload/send any material that must be returned.

**SUBGRANT BUDGET INSTRUCTIONS**

Recipient must prepare a budget detailing the expenditures for each year in the 18-month planning period and/or the one to two year implementation period. For purposes of this subgrant, with the exception of 2019, each subgrant year begins on October 1 and ends on September 30 of the subsequent year. Each year’s budget must not exceed the award totals shown in the table below:

Grant Year	First Year	Second Year	Total Award
March 2019 Awardees	\$546,360	\$253,640	\$800,000
October 2019 Awardees	\$540,985	\$259,015	\$800,000
October 2020 Awardees	\$526,074	\$298,926	\$825,000
October 2021 Awardees	\$425,565	\$411,935	\$837,500

**Note:** Subgrantees may choose to not seek a planning period and request an implementation grant for up to two years.

**Budget Format and Content**

The applicant will be required to account for all CSP grant funds in a separate accounting fund number 285. The school’s CSP budget must identify all budget line items by General Ledger Account Code (“G/L” Code”), in conformance with the Idaho Financial Accounting Reporting Management System (IFARMS) Manual. The budget must be submitted in Microsoft Excel format with the following information:

- Column A:** G/L Code conforming to IFARMS.
- Column B:** General Ledger Account Description.
- Column C:** Budgeted amount, year 1 (October 1 to September 30).
- Column D:** Budgeted amount, year 2 (October 1 to September 30).
- Column E:** Total (sum of column C and D).

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**Column F:** Description of the expense, including assumptions used.

A template will be made available to applicants through the application portal. The template will provide G/L codes for typical allowable expenses. The following table is an illustrative example of the budget template that will be provided to applicants seeking planning and/or implementation subgrant support.

Example plan through 6/30/2021 (6 month planning, 21 month implementation, 27 month total) broken out by school fiscal year to make planning easier and to match data to your school budgets.

GL Account	Account Description (feel free to modify)	7/1/19 9/30/19	10/1/19 6/30/21		
Grand Total:		Planning	Implementation	Grand total	School's Expense Assumptions
<b>Staffing:</b>					
100-512110-000-000-0	Elementary Certified Staff			0	
285-512115-000-000-0	Elementary Classified Staff			0	
285-512210-000-000-0	Elementary EE Benefits - PERSI			0	
285-512220-000-000-0	Elementary EE Benefits - Taxes			0	
285-512240-000-000-0	Elementary EE Benefits - Insurance			0	
285-515110-000-000-0	Secondary Certified Staff			0	
285-515115-000-000-0	Secondary Classified Staff			0	
285-515210-000-000-0	Secondary EE Benefits - PERSI			0	
285-515220-000-000-0	Secondary EE Benefits - Taxes			0	
285-515240-000-000-0	Secondary EE Benefits - Insurance			0	
285-517110-000-000-0	Salaries - Alternative Certified			0	
285-517115-000-000-0	Salaries - Alternative Classified			0	
285-517210-000-000-0	Alternative EE Benefits - PERSI			0	
285-517220-000-000-0	Alternative EE Benefits - Taxes			0	
285-517240-000-000-0	Alternative EE Benefits - Insurance			0	

**General Budget Guidelines & 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 cost, 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 necessary and reasonable for the proper and efficient performance and administration of the grant program.

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- 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 (refer to Use of Funds on pages 16-17)**

Fundable activities are limited to those identified in ESEA §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.
- 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.
- Costs associated with creating and implementing office functions, such as accounting systems, attendance and registration systems, and human resources 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.

***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**

- Facility construction, renovation or other or capital improvement costs, except as described above.
- Apparel.
- Lobbying.
- Student activities.
- 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.
- Funding cannot be redirected for other uses (e.g. traditional public schools that are not charters).

This list is not inclusive but is presented to show typical items that cannot be covered with grant funds.

#### **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.

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.

Idaho State Department of Education IFARMS Manual:

<https://www.sde.idaho.gov/finance/files/general/manuals/IFARMS-Manual.pdf>

#### **Budget Checklist**

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The following checklist will be used to evaluate the budget. Please ensure that the grant and/or budget narrative includes information that allows the reviewer to determine whether or not the school is compliant with these requirements.

<b>BUDGET CHECKLIST</b>	<b>Check for "Yes"</b>	<b>Check for "N/A"</b>
Budget conforms to General Guidelines and Restrictions, meets all allowable and unallowable cost restrictions, and accounts for the entire grant award.		
Budget supplements, not supplants, 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.		
Budget does not include construction or extended salaries.		
Budget does not include recurring costs once designated revenue is available for those items.		
Budget does not include items that will be utilized by grade levels or student groups not intended to be covered by the grant, e.g., pre-K (unless a waiver is secured) or existing students outside the scope of an expansion project.		
Three year operating budget submitted to the state-approved authorizer demonstrates that the applicant will maintain financial sustainability after the end of the subgrant period.		

**APPLICATION OUTLINE**

**Part I: Cover Page & Checklists (No Points)**

**A. School Project Cover Page, signed**

School Name:	
Contact Person for Grant:	Title:
Application to: Start Up   Expand   Replicate	Expected Date School Will Open, Expand, Replicate:
Charter Award Date:	Charter Expiration Date:
DUNS #:	
Proposed Charter Address:	
Applicant Address (if different than proposed):	
Applicant Telephone:	Applicant Email:
<b>Fiscal Contact</b>	
Fiscal Manager:	Title:
Telephone:	Email:

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<b>Charter School Board Contact Information</b>	
Board President:	Email:
Address:	
<b>Authorizer Contact Information</b>	
Authorizing Agency:	Authorizing agency contact person:
Telephone:	Email:
Address:	
<p><b>ESEA § 4310 (6)</b> 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.</p>	
_____	_____
Authorizer Official Printed Name	Title
_____	_____
Signature	Date

<b>Grade Levels to be Served</b>		
<b>Year of Grant Implementation</b>	<b>Grade Levels</b>	<b>Projected Student Enrollment</b>
First Year		
Second Year		
Third Year		
Fourth Year		
Fifth Year		
Maximum		
<b>Student Demographics</b>		
<i>indicate if actual or expected percentage of total student population</i>		
	Actual	Expected
Free/Reduced Price Lunch:	Special Education:	English Learners:

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Black:	Native Hawaiian or Other Pacific Islander:	Hispanic:
American Indian:	Multiracial:	Asian:
White:	Male:	Female:

<b>Management Organization Information</b>		
<p>Will the school work with a charter or educational management organization?</p> <p align="center">Yes                      No</p> <p>If no, skip to the next page.</p>		
<p>If yes, name the management organization:</p> <p>Employer Identification Number (EIN):</p>		
Is the management organization:	For Profit	Not for Profit
Employees of the school will be:	<p>Employed by the school</p> <p>Employed by the management organization</p>	
<p><b>Note about management organizations:</b></p> <p>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 the 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.</p> <p>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.</p>		

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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. In order to be considered eligible, the school must demonstrate that the CMO or EMO has no involvement with the administration of the subgrant. The following factors will be considered:

- a) Whether the charter school's governing board is selected by, or includes members who are employees of the CMO or EMO;
- b) 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;
- c) Whether the contract between the charter school and the CMO or EMO was negotiated at "arms-length," clearly describes each party's rights, roles and responsibilities, and specifics 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)
- d) Whether the fee paid by the charter school to the CMO or EMO is reasonable for the type of management services provided; and
- e) 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](#).

**B. Certification and Assurances, signed**

**Certifications & 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 school petition from an Idaho 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, Bluum, and the school's authorizer, including on-site and desktop monitoring conducted by Bluum, 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 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. Subgrant recipients will expend implementation funds only for the purpose of implementation activities in a charter school which is nonsectarian in its programs, admissions, policies, employment practices, and all other operations, and which will be in compliance with all Idaho laws and administrative rules regarding staff certification and licensure.

\_\_\_ 5. Subgrant Recipients will be aware of and comply with federal laws including, but not limited to, 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, 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.

\_\_\_ 6. Subgrant recipients will comply with all state and local laws and health and safety requirements applicable to Charter Schools, including but not limited to all laws related to student

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admissions and enrollment, non-discrimination, data reporting, compulsory student attendance, and accountability.

\_\_ 7. Subgrant recipients will comply with all provisions of the Public Charter Schools Program of the U.S. Department of Education, including compliance with activities allowable for implementation funds. This section requires compliance with the Nonregulatory Guidance for CSP funds.

\_\_ 8. Subgrant recipients ensure that the Charter School will receive funds through programs administered by the U.S. Department of Education under which funds are allocated on a formulary basis.

\_\_ 9. Subgrant recipients shall include important information on the website of the school, as required in ESEA § 4303 (f)(2)(G), to help parents and the community to make informed decisions about the education options available to their children, including information on the educational program, student support services, parent contract requirements (including any financial obligations or fees and information regarding textbook assistance), and enrollment criteria. This section requires the school to also provide annual performance and enrollment data for the student body and subgroups of students on its website and also to Bluum or its designator researcher in order to share through research and grant reports.

\_\_ 10. 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 Bluum 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. If any findings of misuse of funds are discovered, project funds must be returned to Bluum. Bluum may terminate a grant award upon thirty days' notice if it is deemed by Bluum that the school is not fulfilling the funded program as specified in the approved project or has not complied with the signed assurances.

\_\_ 11. It is the responsibility of each Charter School that receives funds under this grant to provide Bluum with evidence of criminal background checks for board members and school staff.

\_\_ 12. The recipient school's board certifies that the charter school is in compliance with the requirements of the federal Children's Internet Protection Act.

\_\_ 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.

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\_\_14. Recipient schools shall ensure that students enrolled in the charter school will be taught the United States Constitution each year on September 17, Constitution Day (<https://www2.ed.gov/policy/fund/guid/constitutionday.html>).

\_\_15. The recipient school and their authorizer certify that the Performance Certificate agreed for the school articulates that student achievement is one of the most important factors for renewal or revocation of the school's charter and that the authorizer reserves the right to revoke or not renew a school's charter based on financial, structural, or operational factors involving the management of the school, or if not agree to amend the Performance Certificate accordingly to include these elements before award monies are distributed.

\_\_16. Recipient schools and their authorizer certify that a high degree of autonomy is built into its charter contract ("Performance Agreement") consistent with the requirements of ESEA § 4310 (2) and ESEA § 4303 (f)(2)(A), including the school's autonomy over budget, operations, and personnel decisions, 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 contract.

\_\_17. The recipient school and their authorizer certify that any CSP subgrant deliverable created in whole, or in part, with federal CSP funds will be openly and publicly licensed, unless otherwise excepted, per 2 CFR part 3474.20(c).

\_\_18. 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. Something on this could be included in the certifications and assurances section, or could be included in other procurement and budgeting guidance and technical assistance provided to applicants/recipients.

**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 five full years from the date of final payment. The school agrees to submit upon request for audit, review, and inspection 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 that is different from their authorizer's auditor.

\_\_ 3. 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 mutual agreed upon arrangement for administrative services

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with the relevant local educational agency. Absent such approval, the local educational agency shall distribute all subgrant funds to the eligible applicant without delay.”

\_\_ 4. Recipient schools will ensure that the awarded grant funds will be spent or encumbered by September 30 of each grant year, unless extenuating circumstances warrant an extension request. Recipients understand that any such extension request must be made by the Authorizer on their behalf no later than September 1 of the respective grant year, and that if an extension request is not approved by on the grounds that extenuating circumstance have not been established the recipient school will be held to the September 30 deadline.

\_\_ 5. 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).

\_\_ 6. 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 Bluum, Inc. of the reason for closure and agrees to notify Bluum, Inc. regarding the appropriate disposition of assets purchased under this grant.

\_\_ 7. 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.

***I have read the above and agree to all terms and assurances.***

\_\_\_\_\_  
Signature of Project Contact

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Signature of Board President

\_\_\_\_\_  
Date Signed

**Part II: Narrative (106 Points)**

The rubric in Part II has criteria will be used by reviewers to evaluate the application as a whole for a total of 100 points. Priority points will be applied for applicants demonstrating they meet the criteria for each, allowing for a total possible score of 106 points. In order for the application to be recommended for funding, applicants must score at least 85 points out of the possible 106 points, and all required parts must be addressed.

If more schools meet the criteria to be funded than there are funds available, applications will be ranked to make final decisions about which schools are funded. Should additional funds remain, applications that score below 85 points may be asked to submit revisions that would bring the application up to a fundable level.

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Part II: Rubric

A. Grant Project Goals			
<i>Identify</i> 3-5 grant project goals and <i>justify</i> each goal in terms of its value in supporting the planning and implementation of your proposed school. <i>All grant spending, including future revisions to your budget, must fit clearly within one of your stated project goals.</i>			
Selection Criteria	Limited or No Evidence	Moderate Evidence	Strong Evidence
1) Each grant project goal is a quality goal and the set of goals fulfill minimum content requirements, to include: <ul style="list-style-type: none"> <li>At least one grant project goal addresses Idaho's required performance criteria for achievement and growth outcomes for <b>EACH</b> subject in Grades 4 and 8 (English Language Arts and mathematics).</li> <li>If serving high school grades, at least one grant project goal addresses the number of students in grade 12 who participate in advanced opportunities, receive industry recognized certifications, or participate in a recognized high school apprenticeship program.</li> <li>At least one grant project goal addresses serving a student population within five percent of local demographics.</li> <li>A minimum of three project goals are clearly articulated with trackable measures and outcomes for each goal.</li> </ul>	0	3	5
2) There is clear alignment among grant project goals, and the overall mission and goals of the school. <ul style="list-style-type: none"> <li>Each grant project goal aligns with the mission and vision for the school.</li> <li>Each grant project goal has a <b>justified</b> purpose that supports the school in reaching performance goals.</li> <li>All grant measures and metrics are appropriately rigorous for targeted student populations.</li> </ul>	0	3	5
<b>TOTAL POINTS</b>			<b>/10</b>
<b>Reviewer Comments – Grant Project Goals:</b>			

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**B. Educational Philosophy, Instructional Practices, and Curriculum**

Fully *describe and justify* the design of the academic program in terms of the educational philosophy, instructional practices, and curriculum that will be utilized to meet the school's performance objectives. Be sure to include key design elements, references supporting its validity and alignment to state and federal requirements, and rationale for why this education model was chosen and how it will produce strong outcomes for the unique community and student population the school will be located within.

Selection Criteria	Limited or No Evidence	Moderate Evidence	Strong Evidence
<p>1) Explains key design elements for the educational model.</p> <ul style="list-style-type: none"> <li>Identifies well-articulated instructional methods, school culture and classroom design, behavioral expectations, enrichment program, electives, and other relevant factors that will impact classroom instruction.</li> <li>Explains how these practices complement curriculum decisions and design.</li> <li>Research-based, and widely accepted, best practices support the educational philosophy of the school and its outlined goals and student outcomes.</li> </ul>	0	3	6
<p>2) Justifies the core academic curriculum for each content area (including English Language Arts, math, science, social studies and the arts).</p> <ul style="list-style-type: none"> <li>Identifies key curriculum materials or the school's approach to curriculum development.</li> <li>Justifies the choice by explaining how the plan for each content area meets or exceeds state and federal requirements in ELA and math (such as alignment with the Idaho Core Standards).</li> </ul>	0	3	6
<p>3) Justifies curricular choices through the use of published research or data-based anecdotal evidence about previous implementation within a similar student demographic.</p> <ul style="list-style-type: none"> <li>Identifies correlations between research and projected school demographic information.</li> <li>Clear alignment between the curriculum and pedagogy is demonstrated.</li> </ul>	0	2	4

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**B. Educational Philosophy, Instructional Practices, and Curriculum CONT.**

Fully *describe and justify* the design of the academic program in terms of the educational philosophy, instructional practices, and curriculum that will be utilized to meet the school's performance objectives. Be sure to include key design elements, references supporting its validity and alignment to state and federal requirements, and rationale for why this education model was chosen and how it will produce strong outcomes for the unique community and student population the school will be located within.

Selection Criteria	Limited or No Evidence	Moderate Evidence	Strong Evidence
4) Identifies how technology will be utilized within the school's instructional delivery and assessment. <ul style="list-style-type: none"> <li>• Describes the plan for technology to be utilized by students and in classroom instruction.</li> <li>• The technology plan sufficiently addresses assessment needs.</li> <li>• Justifies the technology plan in terms of suitability for the educational model, academic program, curricular choices and student demographic.</li> </ul>	0	1	2
5) Consistent with definition of a charter school in ESEA §4310, the school justifies how key elements have been chosen to utilize autonomies and flexibilities granted to charter schools under state statute to create programs that meets the unique needs of the school's anticipated demographics.	0	1	2
<b>TOTAL POINTS</b>			<b>/20</b>
<b>Reviewer Comments - Educational Philosophy, Instructional Practices, and Curriculum:</b>			

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**C. Teaching and Learning**

Fully *describe and justify* the design of the instructional strategy in terms of the educational philosophy, instructional practices, and curriculum that will be utilized to meet the school's performance objectives. Be sure to include key design elements, references supporting its validity and alignment to state and federal requirements, and rationale for why this strategy was chosen and how it will produce strong outcomes for the unique community and student population the school will serve.

Selection Criteria	Limited or No Evidence	Moderate Evidence	Strong Evidence
<p>1) Explains how teachers will use a range of data and varied instructional strategies to support individual learners.</p> <ul style="list-style-type: none"> <li>• Instructional practices and types of tools and curriculum presented are detailed, realistic, and consistent with the proposed educational program.</li> <li>• Explains how the school will use classroom and/or standardized assessments to determine the needs of individual students and to drive and differentiate instruction.</li> <li>• Identifies the range of differentiation and intervention structures (RTI and Multi-Tiered System of Supports), tools, and approaches in your design and explains how teachers will use these systems to respond to the needs of individual students.</li> </ul>	0	4	6
<b>TOTAL POINTS</b>			<b>/6</b>
<b>Reviewer Comments – Teaching and Learning:</b>			



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**D. Student Academic Achievement Standards**

As an independently governed public school, charter schools need to ensure plans, systems, and tools for strong oversight and monitoring in the areas of academic performance. In this section, persuade the reader that your school will have rigorous goals and adequate oversight to ensure quality implementation, operation, and accountability.

Selection Criteria	Limited or No Evidence	Moderate Evidence	Strong Evidence
<p>1) A broad and thorough Performance Management plan exists for monitoring and reporting progress toward performance goals that ensures successful student outcomes.</p> <ul style="list-style-type: none"> <li>• Identifies sound assessment practices that effectively monitor student and teacher performance.</li> <li>• Identifies what data or information is (or will be) collected, how it will be analyzed, and by whom.</li> <li>• Interim benchmarks have been identified to ensure progress toward performance goals for all student subgroups, and a plan is presented to adjust these benchmarks annually.</li> <li>• Describes how this data is (or will be) utilized to inform policy and management decisions.</li> </ul>	0	4	6
<p>2) A culture of data-driven instruction exists.</p> <ul style="list-style-type: none"> <li>• A portfolio inclusive of formative, interim and summative assessment tools are consistently used and well understood by all staff.</li> <li>• A system for data analysis and reflection to inform instruction is in place</li> </ul>	0	2	3
<b>TOTAL POINTS</b>			<b>/9</b>
<b>Reviewer Comments – Student Academic Achievement Standards:</b>			

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<b>E. Student Demand and Community/Local Support</b>			
Schools funded under the CSP subgrant must ensure they are in tune with their communities' needs and priorities. In this section schools will document their vitality and long-term sustainability through demonstrating their dedication to developing and maintaining community partnerships and connections.			
<b>Selection Criteria</b>	<b>Limited or No Evidence</b>	<b>Moderate Evidence</b>	<b>Strong Evidence</b>
<p>1) Demonstrates community need and demand for the school and its particular educational model.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> There is a sound strategy in place for marketing, branding, and community outreach to achieve promised student enrollment.                             <ul style="list-style-type: none"> <li>• Includes specific strategies for recruiting educationally disadvantaged, at-risk, diverse, and underserved families.</li> <li>• Sufficient funds are dedicated in budget to marketing, recruitment, and outreach.</li> </ul> </li> <li><input type="checkbox"/> Based on the results of outreach efforts to date, provide a projection for each category of educationally disadvantaged students to be served. The combined percentage of projected non-white, English Language Learner, economically disadvantaged (low-income), and Special Education (Individuals with Disabilities) students is no less than 5% below the combined percentage for traditional public schools within the school's enrollment catchment.</li> <li><input type="checkbox"/> The enrollment goals for each year through final expansion are reasonable and supported by credible data.</li> </ul>	0	4	6
<p>2) Demonstrates significant planning and effort to meaningfully engage and solicit input from current and prospective families and community members on the implementation and operation of the school.</p> <ul style="list-style-type: none"> <li>• Describes the current level of parent engagement in the new school or expansion project.</li> <li>• Includes a description of effective parent, family, and community engagement strategies that are utilized by the school.</li> <li>• Documents a sound strategy is in place to secure interest and engagement of community members, local partners, and other community and political support for the school.</li> <li>• Describe the roles parents and community members may play in the school's decision-making and life on an ongoing basis.</li> </ul>	0	3	4
<b>TOTAL POINTS</b>			<b>/10</b>
<b>Reviewer Comments – Student Demand and Community/Local Support:</b>			

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<b>F. Effectively Serving All Students</b>			
Charter schools are obligated to take specific actions to ensure an open, fair, non-selective method of attracting and enrolling students, and all charter schools need to be ready to serve the group of students that choose to attend. In this section, describe your plan to offer a continuum of services for all types of students, including those that are educationally disadvantaged (such as low-income, special education, English learners, homeless, migrant and other at-risk students) and gifted and talented.			
<b>Selection Criteria</b>	<b>Limited or No Evidence</b>	<b>Moderate Evidence</b>	<b>Strong Evidence</b>
<p>1) Justify the design of the school's programs, interventions, and/or plans to support your educationally disadvantaged (ELL, Economically disadvantaged, etc.) and at-risk (rural, drop-out, etc.) student populations.</p> <ul style="list-style-type: none"> <li>The needs of the school's current and/or prospective educationally disadvantaged students are well understood.</li> <li>High expectations are in place for all students.</li> <li>A comprehensive academic and behavioral intervention strategy is in place to identify and support students.</li> <li>Staff is appropriately trained on effective intervention strategies and corresponding support tools.</li> </ul>	0	2	4
<p>2) Justify the design of the school's programs, interventions, and/or plans to support your students with disabilities.</p> <ul style="list-style-type: none"> <li>The needs of the school's current and/or prospective students with disabilities are well understood.</li> <li>High expectations are in place for all students.</li> <li>A comprehensive academic and behavioral strategy is in place to identify and support students.</li> <li>Describes how the school has ensured (or will ensure) appropriately trained staff for special education students.</li> </ul>	0	2	4
<p>3) The school identifies a plan that meets the nutritional needs of its educationally disadvantaged and at-risk students.</p> <ul style="list-style-type: none"> <li>The school outlines if and how it plans to provide meals at the school.</li> <li>The food service plan identifies federal, state and local funding sources to sustain the program.</li> <li>The school food service plan is sound, compliant and adequately addresses the nutrition needs of the school's current and/or projected student population.</li> </ul>	0	1	2

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**F. Effectively Serving All Students CONT.**

Charter schools are obligated to take specific actions to ensure an open, fair, non-selective method of attracting and enrolling students, and all charter schools need to be ready to serve the group of students that choose to attend. In this section, describe your plan to offer a continuum of services for all types of students, including those that are educationally disadvantaged (such as low-income, special education, English learners, homeless, migrant and other at-risk students) and gifted and talented.

Selection Criteria	Limited or No Evidence	Moderate Evidence	Strong Evidence
4) The school identifies a plan that meets the transportation needs of its current and/or projected student population. <ul style="list-style-type: none"> <li>• The school outlines if and how it plans to provide transportation services to all or part of its student population.</li> <li>• The transportation plan addresses the needs of educationally disadvantaged students (including homeless, foster and students with disabilities), and addresses provision for participation in extracurricular activities.</li> </ul>	0	1	2
<b>TOTAL POINTS</b>			<b>/12</b>
<b>Reviewer Comments – Effectively Serving All Students:</b>			

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<b>G. Staffing and Professional Development Plan</b>			
Describe the approach to staffing, inclusive of ratios, positions, etc. required for effective implementation of the chosen education model. Further, describe the process in which all staff will be supported in their ongoing professional development.			
<b>Selection Criteria</b>	<b>Limited or No Evidence</b>	<b>Moderate Evidence</b>	<b>Strong Evidence</b>
<p>1) Provide a summary of the school's approach to staffing.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Outlines a feasible staffing structure that can reasonably deliver the educational model and associated support services.</li> <li><input type="checkbox"/> Identifies steps that will be taken to ensure recruitment and selection of outstanding staff.</li> <li><input type="checkbox"/> The staff recruitment plan is sufficiently sound to achieve the school's opening and/or growth plan and a demonstrated ability to attract, recruit, develop, and retain top instructional talent.</li> </ul>	0	1	2
<p>2) Provide a summary of the school's plan for all staff development, evaluation, and retention.</p> <ul style="list-style-type: none"> <li>• The school provides sufficient support to all staff to ensure the educational model will be implemented with fidelity across all grade levels.</li> <li>• The school demonstrates how it will utilize coaching and feedback to develop staff.</li> <li>• The school has a sound plan for supporting and encouraging innovation and continuous improvement within the classroom.</li> </ul>	0	1	2
<b>TOTAL POINTS</b>			<b>/4</b>
<b>Reviewer Comments – Staffing and Professional Development Plan:</b>			

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**H. Financial Management and Monitoring Plan**

As independently governed public schools, charters are fully responsible for ensuring quality financial management practices and ongoing financial stability. In this section, explain your school's plan to be compliant, strategic, and responsible with finances and business services.

Selection Criteria	Limited or No Evidence	Moderate Evidence	Strong Evidence
<p>1) The applicant has demonstrated through a clear and comprehensive plan the operational and financial capability to manage the successful and sustainable implementation of the proposed activities.</p> <ul style="list-style-type: none"> <li>The applicant provides a 3-year operating budget that demonstrates both financial viability, sustainability, and autonomy through conservative and sound financial assumptions (revenue growth, inflation, compensation, positive cash flow, etc.).</li> <li>The completed CSP Budget Template (appendix A) and the grant project goals and expenditures in that budget align with what is presented in the budget narrative.</li> <li>A strong plan for implementation that includes key personnel and target dates for completion of activities and purchasing has been presented through the budget narrative and CSP Budget Template detail.</li> <li>Budget explains if the applicant charter school is seeking or has received additional grant funding for implementation or operational costs through any other sources outside of the CSP grant.</li> </ul>	0	2	3
<p>2) Ensures a viable, well-conceived facilities plan.</p> <ul style="list-style-type: none"> <li>Identifies the facility plan and associated timeline for acquiring, developing, and/or remodeling, as well as equipping, the new school or expansion facility.</li> <li>Identifies a specific location for the school that provides an adequate learning environment sufficient to carry out the school's educational model and programmatic needs and is easily accessible to the intended student population. If a facility is not identified there is a viable plan for obtaining a facility to ensure timely opening/expansion of the school.</li> <li>The facilities plan demonstrates the school's ability to meet the needs of students receiving special services.</li> <li>Facility costs are feasible and below 20% of the school's annual budget.</li> </ul>	0	1	2

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<b>H. Financial Management and Monitoring Plan CONT.</b>			
As independently governed public schools, charters are fully responsible for ensuring quality financial management practices and ongoing financial stability. In this section, explain your school's plan to be compliant, strategic, and responsible with finances and business services.			
<b>Selection Criteria</b>	<b>Limited or No Evidence</b>	<b>Moderate Evidence</b>	<b>Strong Evidence</b>
<p>3) The school's budget contains sufficient resources to successfully carry out strategies and programs for educationally disadvantaged and at-risk students.</p> <ul style="list-style-type: none"> <li>The budget narrative demonstrates investment in value-added activity to accelerate learning for educationally disadvantaged and at-risk students.</li> <li>A plan is in place to mitigate risk associated with projected enrollment and underestimated financial resources necessary to adequately serve the population of students enrolled.</li> </ul>	0	1	2
<b>TOTAL POINTS</b>			<b>/7</b>
<b>Reviewer Comments – Financial Management and Monitoring Plan:</b>			

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**I. Board Capacity and Governance Structure**

A competent, trained governing board is essential to the success of a public charter school. In this section the school will demonstrate how it has developed a strong governing board with a diverse set of skills. Board members should understand their roles and responsibilities and have in place a transition plan and ongoing professional develop to maintain board strength going forward.

Selection Criteria	Limited or No Evidence	Moderate Evidence	Strong Evidence
1) Justifies the composition and selection process for the governing board. <ul style="list-style-type: none"> <li>Explain how the composition and selection process ensures adequate expertise (including education, law, real estate, strategy, finance, management, and external relations) to perform board responsibilities. Any gaps in skills are identified and a plan exists to address them through recruiting additional board members or through acquiring board training in specific areas.</li> </ul>	0	2	5
2) The board has established clear policies and procedures that guide its oversight of the school. <ul style="list-style-type: none"> <li>Outlines a comprehensive set of board roles and responsibilities, inclusive of ensuring compliance with Open Meetings and Open Records Law.</li> <li>Explains how the board ensures they remain at the governance level of leadership not the school management level of operations.</li> <li>Outlines how the board's policies and procedures ensure monitoring of performance and academic, financial, operational, and legal compliance, including annual review of policies and completion of a Conflict of Interest form.</li> </ul>	0	2	5
3) Justifies how the board has invested in its own abilities and ongoing professional development. <ul style="list-style-type: none"> <li>The school has prioritized board training and ongoing professional development through a detailed plan and meaningful inclusion in its operating budget.</li> <li>This plan includes regular self-evaluations that help identify areas for continuous improvement and ensures participation in ongoing development.</li> </ul>	0	1	2
<b>TOTAL POINTS</b>	<b>/12</b>		
<b>Reviewer Comments – Board Capacity and Governance Structure:</b>			

<b>J. School Leadership and Management</b>			
This section should describe the intended leadership structure of your school and demonstrate a strong leadership and staffing plan that ensures high-quality implementation and sustainability of the school.			
<b>Selection Criteria</b>	<b>Limited or No Evidence</b>	<b>Moderate Evidence</b>	<b>Strong Evidence</b>
<p>1) The leadership and administrative roles at the school are well-defined, and comprehensively cover the broad set of responsibilities required of charter school leadership.</p> <ul style="list-style-type: none"> <li>• Presents a complete organizational and management plan for the school that includes clear division of roles and management responsibilities (including role of Educational Management, Charter Management Organization or Education Service Providers if applicable).</li> <li>• Articulates a comprehensive process that will be used by the board to evaluate the performance of the school leadership and/or ESP, including identification of appropriate protocol for addressing performance concerns.</li> <li>• The school has designed its leadership team to ensure sufficient expertise to manage charter school specific compliance, operations, finance, and legal matters.</li> </ul>	0	4	6
<p>2) The school demonstrates sufficient leadership and governance capability to implement and sustain the new school or expansion project(s) outlined in this application.</p> <ul style="list-style-type: none"> <li>• The school has sufficiently identified any material operational challenges and has developed an adequate response for each.</li> <li>• The school is aware of the key risk factors they face and have skilled leadership and soundly-developed strategies to navigate and mitigate them.</li> <li>• The school's leadership team demonstrates the ability to operate soundly, strategically and in ways that staff and stakeholders can understand and follow.</li> </ul>	0	2	4
<b>TOTAL POINTS</b>			<b>/10</b>
<b>Reviewer Comments – School Leadership and Management:</b>			

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APPLICATION TOTAL POINTS		
Rubric Section	Points Awarded	Points Possible
A. Grant Project Goals		10
B. Educational Philosophy, Instructional Practices, and Curriculum		20
C. Teaching and Learning		6
D. Student Academic Achievement Standards		9
E. Student Demand and Community/Local Support		10
F. Effectively Serving All Students		12
G. Staffing and Professional Development Plan		4
H. Financial Management and Monitoring Plan		7
I. Board Capacity and Governance Structure		12
J. School Leadership and Management		10
<b>STANDARD POINTS AWARDED</b>		<b>100</b>
<b>Priority Points: 2 Additional Points</b> may be awarded for schools that articulate a plan to serve and intentionally meet the unique needs of students in rural geographic areas.		2
<b>Priority Points: 2 Additional Points</b> may be awarded for schools that provide a high-quality high school program.		2
<b>Priority Points: 2 Additional Points</b> may be awarded for schools that articulate a plan to serve and intentionally meet the unique needs of a student population of more than 50% economically disadvantaged students.		2
<b>TOTAL POINTS AWARDED</b>		<b>106</b>
<b>Reviewer Comments:</b>		

**Part III: Appendices (No Points)**

Appendices are required where applicable but will not be scored. They are not included in the narrative's 25-page double space limit.

- A. School Project Budget (includes planning and implementation goals)
- B. Budget Narrative
- C. 3 Year Operational Budget
- D. Up to last 3 years of Audited Financial Statements (replication or expansion)
- E. Up to last 3 years of 990's (replication or expansion)
- F. Charter Certificate and/or Charter Contract, as agreed between the charter school and its authorizer (If not included, please also attach the following):
  - a. Articles of Incorporation
  - b. Bylaws
  - c. 501(c)3 confirmation
  - d. Any conditions imposed by the authorizer
  - e. Includes financial, academic, operational performance measures
- G. ESP/Vendor/Partner Contracts (or drafts) that include a description of roles and responsibilities for each party.
- H. Lease/Real Estate agreement (or drafts)
- I. Academic Data exceeding the state targets (replication or expansion)
- J. Annual Secretary of State Filing (3 years) (replication or expansion)
- K. Board and School Leader Bios/Resumes