



# *The Charter School Program Grant Amendment Process*

Office of Independent Education and Parental Choice

*October 2021*



FLORIDA DEPARTMENT OF  
**EDUCATION**  
fldoe.org

[www.FLDOE.org](http://www.FLDOE.org)

## Budget Amendments

- May be submitted to:
  1. reallocate approved funding.
  2. request remaining grant funds.
- Forms:
  1. DOE150, Project Amendment Request
  2. DOE151, Budget Amendment Narrative Form

# Budget Amendments

- Form DOE 150, Project Amendment Request

FLORIDA DEPARTMENT OF EDUCATION PROJECT AMENDMENT REQUEST		
Please return to: Florida Department of Education Office of Grants Management Room 332 Turlington Building 325 West Gaines Street Tallahassee, Florida 32399-0400 Telephone: (850) 245-0496	A) Agency Name:	DOE USE ONLY Date Received
	B) Program Name: _____	Project Number (DOE Assigned)
TAPS Number: _____	D) Amendment Request Contact Information	
C) Amendment Type <input type="checkbox"/> Program <input type="checkbox"/> Budget	Contact Name:	Telephone Numbers:
Amendment Number: _____	Mailing Address:	E-mail Addresses:
E) Required Signature and Certification		
I, _____, (Please Type Name) as the official who is authorized to legally bind the agency/organization, do hereby certify to the best of my knowledge and belief that all the information and attachments submitted in this application amendment are true, complete and accurate, for the purposes, and objectives, set forth in the RFA or RFP and are consistent with the statement of general assurances and specific programmatic assurances for this project. I am aware that any false, fictitious or fraudulent information or the omission of any material fact may subject me to criminal, or administrative penalties for the false statement, false claims or otherwise. Furthermore, all applicable statutes, regulations, and procedures; administrative and programmatic requirements; and procedures for fiscal control and maintenance of records will be implemented to ensure proper accountability for the expenditure of funds on this project. All records necessary to substantiate these requirements will be available for review by appropriate state and federal staff. I further certify that all expenditures will be obligated on or after the effective date and prior to the termination date of the project. Disbursements will be reported only as appropriate to this project, and will not be used for matching funds on this or any special project, where prohibited.		
Further, I understand that it is the responsibility of the agency head to obtain from its governing body the authorization for the submission of this application amendment.		
Signature of Agency Head _____	Title _____	Date _____
Signature of Charter Head _____	Title _____	Date _____
F) Narrative		
<div style="border: 2px solid red; height: 100px;"></div>		



# Budget Amendment – Reallocation

- Reallocate funds for unused budget items.
- Identify any quantities already purchased (provide price per item, quantity, and total).

**FLORIDA DEPARTMENT OF EDUCATION  
BUDGET AMENDMENT NARRATIVE FORM**

A) Levy County Schools/Education Center B) 990-20004-0041/19C079  
District/Agency Name Project Number/TAP \$ Number


C) 3  
Amendment Number

D) Total Project Amount Currently Approved \$503,296.00 E) Total Project Amount resulting from this Budget Amendment \$ 503,296.00

F) Line Function	Item Description Object	Account Title and Narrative	FTE	Amount Increase	Amount Decrease
5100	642	Hexagon Desk Globe	0.00		\$ 6,600.00
5100	642	Polypropylene Top Portable Stage	0.00		\$ 1,178.00
5100	642	Clover Activity Tables	0.00		\$ 4,650.00
5100	644	Printer (Wireless w/ Mobile Printing)	0.00		\$ 3,000.00
6400	642	Atomic Clocks (Black)	0.00		\$ 990.00
7300	642	Mesa Series L Shaped Desk	0.00		\$ 2,088.00
5100	510	Instructional Supplies - 200 cases of copy paper multi-colors @ 26.99 per carton (\$5398.00) - this paper will be used for student forms, making copies of instructional materials (since there are no textbooks, and family communication); pencils and pens for students to use for instructional work - 100 packs of pencils @ \$6.00 each (\$600.00); 100 packs of markers @ \$8.66 each (\$866.00)	0	\$ 9,253.00	
5100	510	Resource Materials Supplies- Benefit students by providing math and science manipulatives to assist learning concepts. These resources will be kept in the math and science classrooms for both 6th and 7th grades. Currently there are 412 students - 30 education math stacks integers @ \$9.96 each (\$2988.00); 14 hands-on equation kits @ \$18.94 each (\$2651.60); 12 star right math triangle flash cards @ \$11.99 each (\$143.88); 10 education geometric folding shapes @ \$37.86 each (\$3786.00); 20 periodic tables @ \$3.26 each (\$652.00); 36 dissection kits @ \$18.46 each (\$664.56); 2 spheres ball @ \$146.99 each (\$293.98); 416 calculators @ \$12.38 each (\$5149.28); 100 containers of clay @ \$18.99 each (\$1899.00); 20 wire cutters @ \$12.69 each (\$253.80)		\$ 9,253.00	
6300					
<b>Total</b>				<b>\$ 18,506.00</b>	<b>\$ 18,506.00</b>

DOE 151  
Revised January 2017

Richard Corcoran, Commissioner



# Budget Amendment – Increase Only

- Expending 90% of approved funds is required.

A) \_\_\_\_\_ District/Agency Name Project Number/TAPS Number \_\_\_\_\_

C) 2 Amendment Number

**FLORIDA DEPARTMENT OF EDUCATION  
BUDGET AMENDMENT NARRATIVE FORM**


D) Total Project Amount Currently Approved \$396,109.00 E) Total Project Amount resulting from this Budget Amendment \$513,159.09

F) Line Item Description

Function	Object	Account Title & Narrative	FTE	Amount Increase	Amount Decrease
5100	369	Basic (FEFP K-12)--Technology-Related Rentals (Original Budget \$5,075-\$2,764=\$2,311)		2,764.00	
5100	520	Basic (FEFP K-12)--Textbooks (4-Subject--Language Arts \$14,864, Math \$6,706.45, Pearson--Curriculum \$29,778.64) Did not use		51,349.09	
5100	643	Basic (FEFP K-12)--Capitalized Computer Hardware (Original 12@\$5,815= \$6,9780 Difference \$4,021) (Actual 12 @ \$5,479.22= \$65,759 Interactive Whiteboards)		\$ 4,021.00	
5100	644	Basic (FEFP K-12)--Noncapitalized Computer Hardware- Student PCs (did not use) Original 186 @ \$681=\$126,666, Actual 109@ \$669.07= \$72,929 differences \$53,737		\$ 53,737.00	
6400	310	Instructional Staff Training Services--Professional and Technical Services [Overage--Final cost under budget]- (Original \$1,500 -Actual \$1,350= \$150)]		\$ 150.00	
6500	319	Basic (FEFP K-12)--Technology-Related Professional and Technical Services--Installation Interactive Whiteboards-- (Overage--Final cost under budget) Original \$6,000 Actual \$5,874= \$126.00		\$ 126.00	
6400	319	Instructional Staff Training Services--Technology-Related Professional and Technical Services-- Training Interactive Whiteboards (Overage--Final cost under budget)-- Original \$2,000 - Actual \$1,875= \$125		\$ 125.00	
7300	630	Camera - Security (Original \$50,396, Actual \$45,620 difference \$4,778)		\$ 4,778.00	
				\$ 117,050.09	\$ -

DOE 151  
Revised July 2015

Pam Stewart, Commissioner





## Tips for Developing a Proposed Budget Amendment

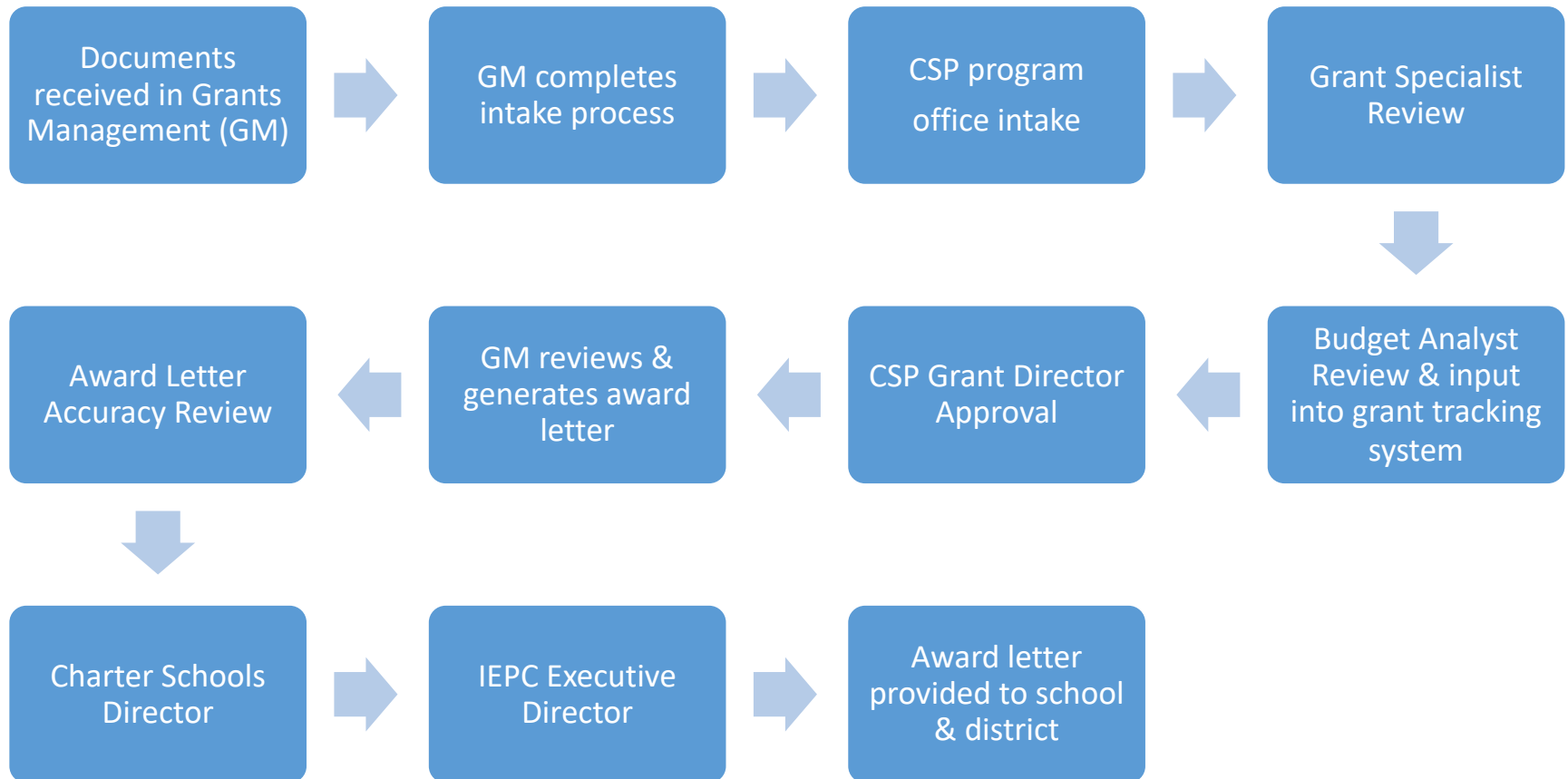
- Refer to the CSP Allowable Costs Guide.
- Describe each item – (who, what, when, where, how) but do not include name brands.
- Round to the nearest dollar for new line items
- Avoid grouping items by vendor/quote.
- Request only items needed during the grant period.
- Submit price quotes or justification, if requested.
- Ensure alignment to current student enrollment and be reasonable, necessary and allowable.

## Tips for Developing a Proposed Budget Amendment, continued

- Ensure all items needed are included in the budget proposal submitted to the DOE.
- Revising approvable budget line items after the initial programmatic review is completed (quantities, cost per item, etc.) delays the approval process.
- For reallocations, exclude line items with < \$1.00 in remaining balances.
- Reallocations should focus on making important adjustments and not revising entire budgets.



# Approval Process





# Award Notification Letter (DOE200)

Florida Department of Education Project Award Notification	
<b>1 PROJECT RECIPIENT</b> Miami-Dade County School District	<b>2 PROJECT NUMBER</b> [REDACTED]
<b>3 PROJECT/PROGRAM TITLE</b> Public Charter School Program (CSP) Planning, Program Design and Implementation	<b>4 AUTHORITY</b> §4.282A Charter Schools, Title V, Part B USDE or Appropriate Agency
<b>5 AMENDMENT INFORMATION</b> Amendment Number: 3 Type of Amendment: No Cost Extension Effective Date: 09/06/2019	<b>6 PROJECT PERIODS</b> Budget Period: 04/03/2018 - 4/02/2020 Program Period: 04/03/2018 - 04/02/2020
<b>7 AUTHORIZED FUNDING</b> Current Approved Budget: \$522,708.00 Amendment Amount: Estimated Roll Forward: Certified Roll Amount: Total Project Amount: \$522,708.00	<b>8 REIMBURSEMENT OPTION</b> Federal Cash Advance
<b>9 TIMELINES</b>	
<ul style="list-style-type: none"> <li>Last date for incurring expenditures and issuing purchase orders: 04/02/2020</li> <li>Date that all obligations are to be liquidated and final disbursement reports submitted: 05/20/2020</li> <li>Last date for receipt of Federal budget and program reports: 04/02/2020</li> <li>Refund date of unexpended funds; mail to DOE Comptroller, 325 W. Gaines Street, 944 Turlington Building, Tallahassee, Florida 32399-0400:</li> <li>Date(s) for program reports:</li> <li>Federal Award Date: 10/01/2016</li> </ul>	
<b>10 DOE CONTACTS</b>	<b>Comptroller Office</b> Phone: (850) 245-0401
Program: Vicki Pineda Phone: (850) 245-0871 Email: Vicki.Pineda@fldoe.org	<b>Duns#:</b> 105964068 <b>FEIN#:</b> F596000572005
<b>Grants Management:</b> Unit C (850) 245-0496	
<b>11 TERMS AND SPECIAL CONDITIONS</b>	
<ul style="list-style-type: none"> <li>This project and any amendments are subject to the procedures outlined in the <u>Project Application and Amendment Procedures for Federal and State Programs</u> (Green Book) and the General Assurances for Participation in Federal and State Programs and the terms and requirements of the Request for Proposal or Request for Application, RFP/RFA, hereby incorporated by reference.</li> <li>For federal cash advance projects, expenditures must be recorded in the Florida Grants System (FLAGS) as close as is administratively feasible to when actual disbursements are made for this project. Cash transaction requests must be limited to amounts needed and be timed with the actual, immediate cash requirements to carry out the purpose of the approved project.</li> <li>All provisions not in conflict with any amendment(s) are still in full force and effect and are to be performed at the level specified in the project award notification.</li> <li>Other: The maximum project periods may not exceed twenty-four (24) months for an implementation-only period from the initial award letter effective date. The Department will consider continued funding of this award if (1) sufficient funds are available, (2) the Department determines that continuing the project would be in the best interest of the State, and (3) the sub-recipient has submitted all required reports and documentation.</li> </ul> <p>The Department retains authority to terminate, with written notice, a project that does not demonstrate progress toward opening and operating a high-quality charter school (see page 2 of DOE-200, #11 for listed items that may restrict access to grant funds).</p>	
<b>12 APPROVED:</b>	
 Authorized Official on behalf of Richard Corcoran Commissioner of Education Date of Signing: 9-11-19	

DOE-200  
Revised 07/15

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INSTRUCTIONS PROJECT AWARD NOTIFICATION	
<ol style="list-style-type: none"> <li>Project Recipient: Agency, Institution or Non-Governmental entity to which the project is awarded.</li> <li>Project Number: This is the agency number, grant number, and project code that must be used in all communication. (Projects with multiple project numbers will have a separate DOE-200 for each project number).</li> <li>Project Description: Title of program and/or project. TAPS #: Departmental tracking number.</li> <li>Authority: Federal Grants - Public Law or authority and CFDA number. State Grants - Appropriation Line Item Number and/or applicable statute and state identifier number.</li> <li>Amendment Information: Amendment number (consecutively numbered), type (programmatic, budgeting, time extension or others) in accordance with the <u>Project Application and Amendment Procedures for Federal and State Programs</u> (Green Book), and effective date.</li> <li>Project Periods: The periods for which the project budget and program are in effect.</li> <li>Authorized Funding: Current Approved Project (total dollars available prior to any amendments); Amendment Amount (total amount of increase or decrease in project funding); Estimated Roll Forward (roll forward funds which have been estimated into this project); and Total Project Amount (total dollars awarded for this project).</li> <li>Reimbursement Options:               <ul style="list-style-type: none"> <li>Federal Cash Advance - On-Line Reporting required monthly to record expenditures.</li> <li>Advance Payment - Upon receipt of the Project Award Notification, up to 25% of the total award may be advanced for the first payment period. To receive subsequent payments, 90% of previous expenditures must be documented and approved by the Department.</li> <li>Quarterly Advance to Public Entity - For quarterly advances of non-federal funding to state agencies and LEAs made in accordance within the authority of the General Appropriations Act. Expenditures must be documented and reported to DOE at the end of the project period. If audited, the recipient must have expenditure detail documentation supporting the requested advances.</li> <li>Reimbursement with Performance - Payment made upon submission of documented allowable expenditures, plus documentation of completion of specified performance objectives.</li> </ul> </li> <li>Timelines: Date requirements for financial and program reporting/requests to the Department of Education.</li> <li>DOE Contacts: Program contact for program issues, Grants Management Unit for processing issues, and Comptroller's Office for reporting issues.</li> <li>Terms and Special Conditions: Listed items apply to this project.               <ul style="list-style-type: none"> <li>The Department retains the right to restrict access to the grant funds under certain circumstances, including but not limited to:                   <ul style="list-style-type: none"> <li>Actual enrollment below 75 percent of projected enrollment,</li> <li>Failure of a sub-recipient charter school to timely submit required expenditures, and inventory reports through FLCSP.org,</li> <li>Purchases made outside of the approved budget, and/or</li> <li>Corrective action required following a monitoring site visit.</li> </ul> </li> </ul> </li> <li>Approved: Approval signature from the Florida Department of Education and the date signature was affixed.</li> </ol>	

DOE-200  
Revised 07/15

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# Using FLCSP for Amendment Requests

# Expenditure Reporting on FLCSP

- Use the Show/Hide Expenditures feature to ensure accurate reallocation requests.
- Report approved quantities and unit costs – expenditure overages should not be included on reporting without program office approval.

← Charter Schools Project Tracking
ABC-2 Sample Charter School | [Sign out](#)

You are currently in impersonation mode. [Restore to: BessG](#)

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### Manage Budget Item

Back to List  
Budget Created: 1/31/2017, Type: Initial

Function Code: 5100 -- Basic (FEFP K-12)	Object Code: 520 -- Textbooks	Total Amount: \$28,500.00
---	----------------------------------	------------------------------

Narrative	Amt Price per Item	Qty-YR1	Qty-YR2	Qty Total	Budget Amount
Textbook (5 subjects x 200 students = 1000)	\$28,500.00	1	0	1	\$28,500.00
<b>No Expenditure</b>					

**Budget Totals**

Projected Amount: \$225,000.00

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Available Amount: \$0.00

Function Code: 5100 -- Basic (FEFP K-12)	Object Code: 642 -- Noncapitalized Furniture, Fixtures, and Equipment	Total Amount: \$2,000.00
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Narrative	Amt Price per Item	Qty-YR1	Qty-YR2	Qty Total	Budget Amount
Non-Capitalized Furniture, Fixtures and Equipment Cases for student tables.	\$50.00	40	0	40	\$2,000.00
<b>Report</b>	<b>Qty Purchased</b>	<b>Remaining Qty</b>	<b>Exp Amt Per Item</b>	<b>Total Exp</b>	<b>Remaining Balance</b>
9/27/2019	5	35	\$50.00	\$250.00	\$1,750.00
<b>Comment:</b>					
9/27/2019	35	0	\$40.00	\$1,400.00	\$350.00
<b>Comment:</b>					
<b>Cumulative</b>	40	0	\$50.00, \$40.00	\$1,650.00	\$350.00

[Show/Hide Expenditure](#)

## Expenditure Reporting on FLCSP, continued

- Report expenditures no later than the 1<sup>st</sup> day of each month.
- Avoid reporting \$0.00
- Increases to **Quantities** or **Unit Costs** require approval from program office – amendments cannot be used to correct overages even if actual expenditures did not exceed the approved line item total.



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## Useful Links

# Amendment Forms

<https://www.fldoe.org/schools/school-choice/charter-schools/charter-school-program-grant/grant-forms.stml>



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 [Charter Schools Program Grant](#) | 
 [CSP Grant Forms](#)

## CHARTER SCHOOLS PROGRAM GRANT

CSP Grant Forms

Training

## CSP Grant Forms

- [DOE 150 - Project Amendment Request \(Word\)](#)
- [DOE 151 - Budget Amendment Narrative Form \(Excel\)](#)
- [Itemized Expenditure Report Template \(Excel\)](#)
- [Site Visit Monitoring Rubric \(PDF\)](#)
- [CSP 2-year Budget Development Tool Instructions \(PDF\)](#)
- [CSP 2-year Budget Development Tool \(Excel\)](#)
- [CMO Questionnaire \(PDF\)](#)
- [CO-Location Questionnaire \(PDF\)](#)

## Technical Assistance

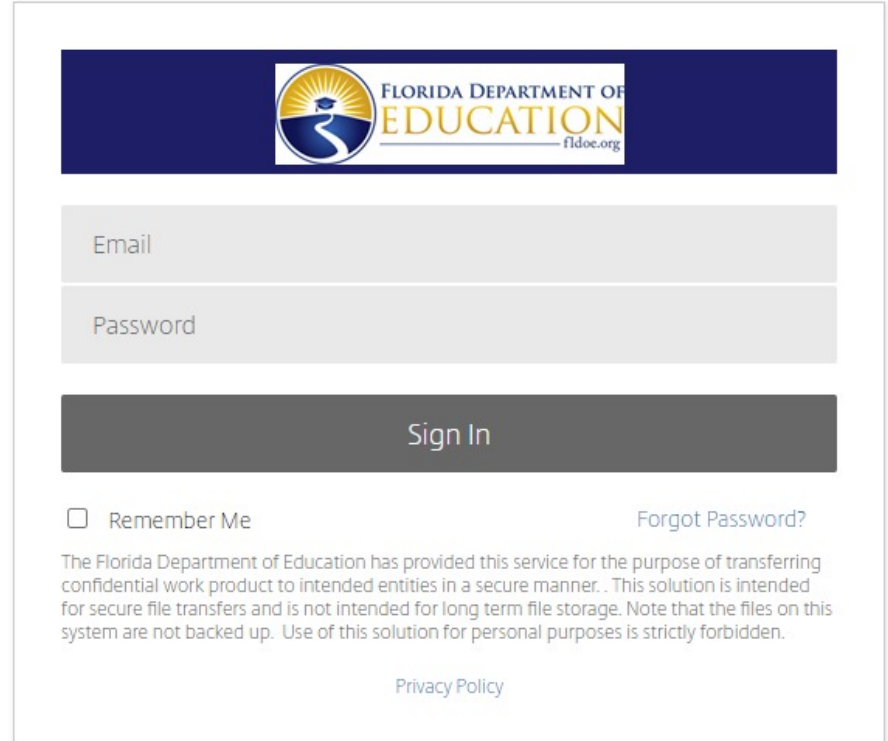
- [Memorandum: Additional Guidance to CSP Budget \(PDF\)](#)
- [2014 Non-regulatory Guidance \(PDF\)](#)
- [Review Standards for CSP Documents \(PDF\)](#) - Revised January 2020



# Sharefile and Submitting Amendments

<https://fldoe.sharefile.com/Authentication/Login>

- For optimal performance, use Google Chrome.
- Only contacts identified by FDOE have access.
- For technical assistance, email the Office of Grants Management at [OGM@fldoe.org](mailto:OGM@fldoe.org)
- All amendments must be submitted via ShareFile – emailed forms will not be accepted.



The screenshot shows the login interface for the Florida Department of Education's ShareFile system. At the top, there is a dark blue header with the Florida Department of Education logo and name. Below the header are two input fields: "Email" and "Password". A dark grey "Sign In" button is positioned below the password field. Underneath the button, there is a checkbox for "Remember Me" and a link for "Forgot Password?". A disclaimer paragraph is located below these options, stating that the service is for secure file transfers and that files are not backed up. A "Privacy Policy" link is at the bottom of the form.

## CSP Grant Team

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[www.FLDOE.org](http://www.FLDOE.org)

