



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

Budget Amendments

May be submitted to:

- Reallocate approved funding.
- Request remaining grant funds.

Forms:

- DOE150, Project Amendment Request
- 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 Amendment Number: _____	Contact Name:	Telephone Numbers:
	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		

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) John W. Mather Charter School/Education Voucher B) 990-20004-0000/19C079
District/Agency Name Project Number/TAP \$ Number


C) 3
Amendment Number

D) Total Project Amount Currently Approved \$503,295.00 E) Total Project Amount resulting from this Budget Amendment \$ 503,295.00

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 Acrylic 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 (2) 26.99 per carton (\$5398.00) - this paper will be used for student to ms. making copies of instructional materials (since there are no textbooks, and family communication s, pencils and pens for students to use for instructional work - 100 packs of pencils (2) \$8.00 each (\$800.00); 100 packs of markers (2) \$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 (2) \$9.86 each (\$295.60); 14 hands-on equation kits (2) \$16.86 each (\$235.92); 12 star right math triangle flash cards (2) \$11.99 each (\$143.88); 10 education geometric folding shapes (2) \$17.86 each (\$357.20); 20 peridotables (2) \$12.25 each (\$245.00); 24 dissection kits (2) \$18.46 each (\$443.04); 2 sphere ball (2) \$146.89 each (\$293.78); 416 calculators (2) \$12.38 each (\$5148.32); 100 containers of clay (2) \$18.89 each (\$1889.00); 26 wire cutters (2) \$12.69 each (\$330.14)		\$ 9,253.00	
6300					
Total				\$ 18,506.00	\$ 18,506.00

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= \$6,978 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 \$50,398, Actual \$45,620 difference \$4,778)		\$ 4,778.00	
				\$ 117,050.09	\$ -

DOE 151
Revised July 2015

Pam Stewart, Commissioner



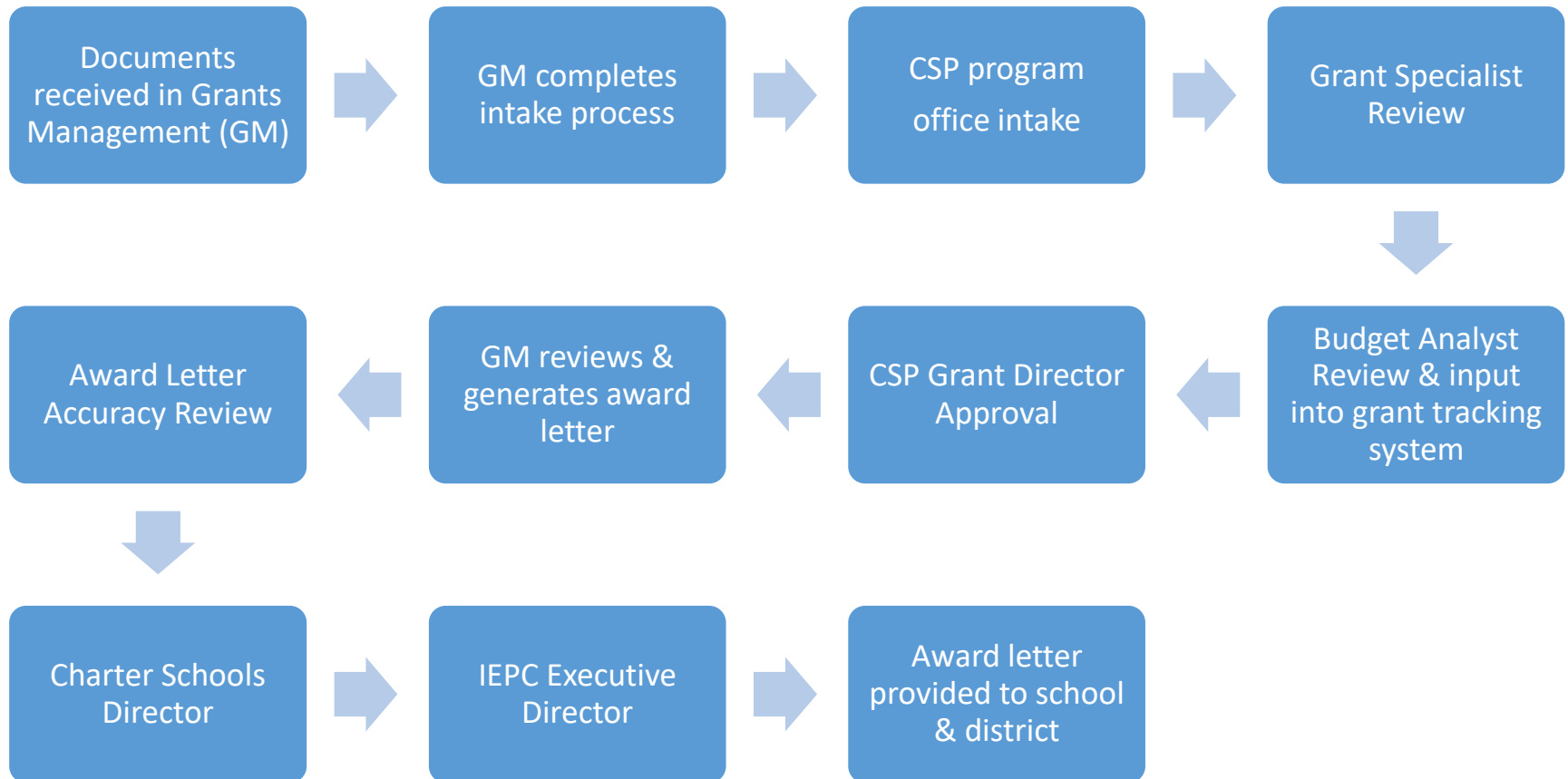
Tips for Developing a Proposed Budget Amendment

- 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	
1 PROJECT RECIPIENT Miami-Dade County School District	2 PROJECT NUMBER ██████████
3 PROJECT/PROGRAM TITLE Public Charter School Program (CSP) Planning, Program Design and Implementation	4 AUTHORITY 84.282A Charter Schools, Title V, Part B USDE or Appropriate Agency
5 AMENDMENT INFORMATION Amendment Number: 3 Type of Amendment: No Cost Extension Effective Date: 09/06/2019	6 PROJECT PERIODS Budget Period: 04/03/2018 - 4/02/2020 Program Period: 04/03/2018 - 04/02/2020
7 AUTHORIZED FUNDING Current Approved Budget: \$522,708.00 Amendment Amount: Estimated Roll Forward: Certified Roll Amount: Total Project Amount: \$522,708.00	8 REIMBURSEMENT OPTION Federal Cash Advance
9 TIMELINES	
<ul style="list-style-type: none"> Last date for incurring expenditures and issuing purchase orders: 04/02/2020 Date that all obligations are to be liquidated and final disbursement reports submitted: 05/20/2020 Last date for receipt of proposed budget and program reports: 03/31/2020 Refund date of unexpended funds; mail to DOE Comptroller, 325 W. Gaines Street, 944 Turlington Building, Tallahassee, Florida 32399-0400: Date(s) for program reports: Federal Award Date: 10/01/2016 	
10 DOE CONTACTS	
Program: Vicki Pineda Phone: (850) 245-0871 Email: Vicki.Pineda@fldoe.org Grants Management: Unit C (850) 245-0496	Comptroller Office Phone: (850) 245-0401 Duns#: 105964068 FEIN#: F596000572005
11 TERMS AND SPECIAL CONDITIONS	
<ul style="list-style-type: none"> 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. 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. 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. 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. 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). 	
12 APPROVED:	
 Authorized Official on behalf of Richard Corcoran Commissioner of Education 9-11-19 Date of Signing	

DOE-200
Revised 07/15

Page 1 of 2

INSTRUCTIONS
PROJECT AWARD NOTIFICATION

- Project Recipient: Agency, Institution or Non-Governmental entity to which the project is awarded.
- 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).
- Project Description: Title of program and/or project. TAPS #: Departmental tracking number.
- Authority: Federal Grants - Public Law or authority and CFDA number. State Grants - Appropriation Line Item Number and/or applicable statute and state identifier number.
- Amendment Information: Amendment number (consecutively numbered), type (programmatic, budgeting, time extension or others) in accordance with the Project Application and Amendment Procedures for Federal and State Programs (Green Book), and effective date.
- Project Periods: The periods for which the project budget and program are in effect.
- 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).
- Reimbursement Options:
 - Federal Cash Advance –On-Line Reporting required monthly to record expenditures.
 - 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.
 - 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.
 - Reimbursement with Performance - Payment made upon submission of documented allowable expenditures, plus documentation of completion of specified performance objectives.
- Timelines: Date requirements for financial and program reporting/requests to the Department of Education.
- DOE Contacts: Program contact for program issues, Grants Management Unit for processing issues, and Comptroller's Office for financial reporting issues.
- Terms and Special Conditions: Listed items apply to this project.
 - The Department retains the right to restrict access to the grant funds under certain circumstances, including but not limited to:
 - Actual enrollment below 75 percent of projected enrollment,
 - Failure of a sub-recipient charter school to timely submit required expenditures, and inventory reports through FLCSP.org,
 - Purchases made outside of the approved budget, and/or
 - Corrective action required following a monitoring site visit.
- Approved: Approval signature from the Florida Department of Education and the date signature was affixed.



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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

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Budget Created: 1/31/2017, Type: Initial

Function Code:	Object Code:	Total Amount:			
5100 -- Basic (FEFP K-12)	520 -- Textbooks	\$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
No Expenditure					

Budget Totals

Projected Amount: \$225,000.00

Available Amount: \$0.00

Function Code:	Object Code:	Total Amount:			
5100 -- Basic (FEFP K-12)	642 -- Noncapitalized Furniture, Fixtures, and Equipment	\$2,000.00			
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
Report	Qty Purchased	Remaining Qty	Exp Amt Per Item	Total Exp	Remaining Balance
9/27/2019	5	35	\$50.00	\$250.00	\$1,750.00
Comment:					
9/27/2019	35	0	\$40.00	\$1,400.00	\$350.00
Comment:					
Cumulative	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 1st 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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AAA

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CHARTER SCHOOLS PROGRAM GRANT

[CSP Grant Forms](#)

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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 \(PDF\)](#)

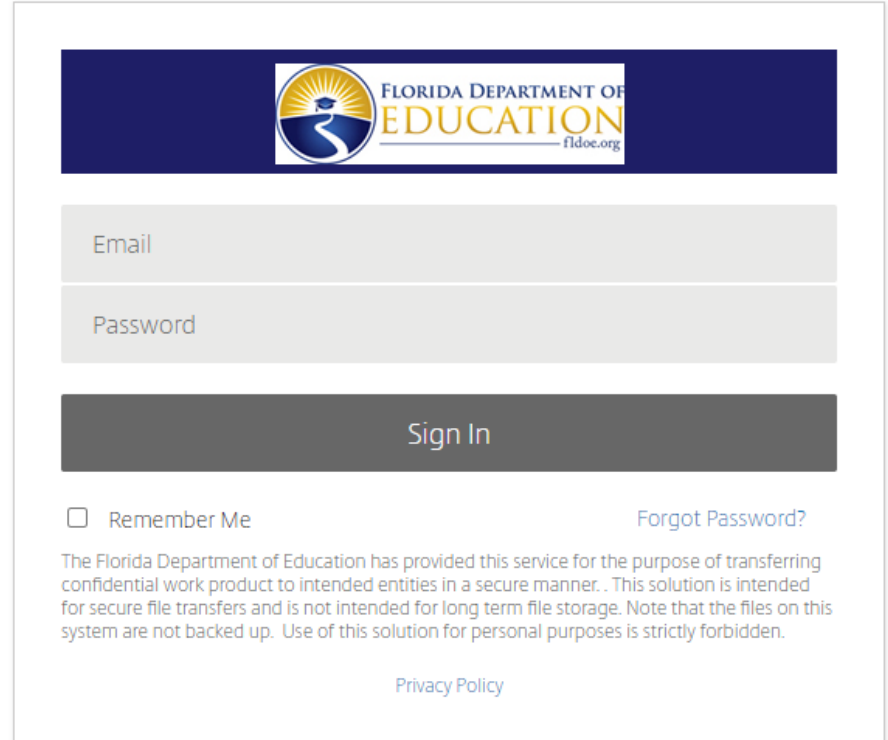
Technical Assistance

- [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
- 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 FDOE 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 the "Remember Me" checkbox, and a "Privacy Policy" link is at the bottom of the form area.

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Email

Password

Sign In

Remember Me [Forgot Password?](#)

The Florida Department of Education has provided this service for the purpose of transferring confidential work product to intended entities in a secure manner. . This solution is intended for secure file transfers and is not intended for long term file storage. Note that the files on this system are not backed up. Use of this solution for personal purposes is strictly forbidden.

[Privacy Policy](#)

CSP Grant Team

Adam Emerson, Charter Director

Adam.Emerson@fldoe.org

Vicki Pineda, CSP Grant Director

Vicki.Pineda@fldoe.org

Horace Taylor, Budget Analyst

Horace.Taylor@fldoe.org

Whitney Blake, Grant Specialist

Whitney.Blake@fldoe.org

Bess Grasswick, Grant Specialist

Bess.Grasswick@fldoe.org

Deneka Hudson, Web Developer

Bess.Grasswick@fldoe.org

Chasity Ingram, Grant Specialist

Chasity.Ingram@fldoe.org



www.FLDOE.org

