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| **Name of Grant Program:** Charter School Start-Up Assistance Program | **Fund Code:** 535 |

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| PART II – REQUIRED PROGRAM INFORMATION |

***For All Eligible Charter Schools***

1. Indirect Costs (line 9) may **not** be charged to this grant.
2. Any construction and facilities lease costs may **not** be charged to this grant, with the exception of **Option A – Planning Period only,** funds may be used for up to six months of facilities lease costs.
3. Recipients of the Charter School Program grant must have an *Agreed Upon Procedure (AUP)* performed as part of their annual financial audit. For details, please see the [*http://www.doe.mass.edu/charter/finance/auditing/fy2020-audit-guide.docx*](http://www.doe.mass.edu/charter/finance/auditing/fy2020-audit-guide.docx)  *section 303.*
4. Please provide and explanation/justification for the budget by line item on separate page and include with electronic signature page submission.

***For Option A – Planning Period***

***Fiscal Policies and Procedures Development ($5,000)*.** The development and documentation of sound business policies and procedures during the start-up period is a critical element of establishing a strong basis for charter school operation. This requirement of the grant is intended to help school leaders and Board members proactively set systems in place for prudent fiscal management. Describe how the school will use these funds to develop and document fiscal policies and procedures. Funds also must be set aside for a member of the business office to receive MCPPO training and certification.

***Curriculum and Assessment System Development ($10,000).*** Comprehensive development of the school’s proposed curriculum and its supporting assessment system prior to opening helps to ensure that students are well served and that the school has critical tools in place. Describe how the school will use these funds to develop curriculum and assessment systems during the planning year.

***Data Management Systems ($15,000).*** Investment in appropriate data management systems from the outset was highlighted by previous grant recipients as crucial in the early stages of running a school. Describe how the school will use these funds to purchase/develop a data management system.

***Student Recruitment of Targeted Population ($5,000).*** Development and execution of a plan to recruit the population set out in the mission of the school.

***Option B Implementation***

***Governance Development ($5,000).*** This requirement of the grant is intended to help school leaders and Board members proactively meet their legal responsibilities for governing a public charter school. Activities might include funding the evaluation of current Board governance, policies, and practices. Other possible uses include holding a Board retreat, training for administrators and Board members, or funding the development of written management and governance policy manuals. *A school may request to waive this spending requirement if it can demonstrate that it has secured and committed funds from other sources for this purpose.*

***External Review of initial School Operations ($5,000).*** This requirement of the grant is intended to provide schools with a report on the implementation status of the goals outlined in the school’s charter, providing direction for further development and improvement. The school is free to select the vendor/consultant who will conduct the review and the results do not have to be submitted to the Charter School Office.

***Data Management Systems ($10,000).*** Investment in appropriate data management systems from the outset was highlighted by previous grant recipients as crucial in the early stages of running a school. Describe how the school will use these funds to purchase/develop a data management system.

**Sheltered English Immersion Endorsement** ($2,500) Scheduling the courses for administrators and teachers.

***Waivers of Spending Requirements.*** If a charter school wishes to request a *waiver* of any of these spending requirements, provide documentation that demonstrates that the school has either already completed the requirement or has secured and committed funds from other sources for this purpose.

***Verification of Expenditures.*** Please note that as part of the final reporting process, the school may be required to submit invoices verifying that expenditures were made for the particular spending requirements detailed above and in accordance with the approved grant budget.

***Additional Information.***

**Unallowable costs include:**

* **Construction**
* **Capitalized Costs part of construction (architect, survey, legal fees etc)**
* **Food**

The grant cannot be awarded for more than 36 months in total.There are no other explicit restrictions; however, keep in mind that this grant is intended to support *start-up activities* and is not intended to support general operating expenses.  **Note:** If an employee is part of the Massachusetts Teachers Retirement System (MTRS) and is funded by a federal grant (such as this one), Massachusetts general laws require that an amount equal to 9 percent of employee salaries must be budgeted for MTRS. This 9 percent is separate from the employees’ mandatory payroll contribution. (See <https://www.doe.mass.edu/grants/procedure/forms/j.doc>.)

Suggested start-up activities that can be paid for out of grant funds include:

1. Development of the school’s Accountability Plan and support of an infrastructure to track progress toward the measurable school performance objectives.
2. Front-loading the development of systems and policies that normally would not be supportable by per-pupil tuition in the school’s early years (e.g., funding full-time business and special education staff to set up appropriate systems or consultants to closely monitor the initial implementation of various programs).
3. Teacher training programs (e.g., through stipends).
4. Informing the community about the school.
5. Acquiring necessary equipment and educational materials and supplies.
6. Acquiring or developing curriculum materials.
7. Creating and implementing office functions, such as accounting systems, attendance and registration systems, and human resources policies.
8. Costs associated with the installation of computers, data systems, networks, and telephones.
9. Personnel expenses 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. (\*Note: If personnel split their time between ongoing operational activities and initial implementation activities, only that portion of the time associated with initial implementation of the charter school is allowable as an initial operational cost. The charter school must maintain accurate time and effort records to document the amount of time each employee works on tasks related to the initial implementation of the charter school.)
10. Rental or occupancy costs for the school facility for up to 6 months in preparation for the school’s opening.