

2023–24 Comprehensive Support and Improvement County Office of Education Reporting Webinar



School Improvement and Support Office

June 26, 2024

Acronyms (1)

- **BR**—Budget Revision
- **CDE**—California Department of Education
- **COE**—County Office of Education
- **CSI**—Comprehensive Support and Improvement
- **EBI**—Evidence-based Intervention
- **ER**—Expenditure Report
- **ESSA**—Every Student Succeeds Act
- **FAQ**—Frequently Asked Question
- **FY**—Fiscal Year



Acronyms (2)

- **GMART**—Grant Management and Reporting Tool
- **LCAP**—Local Control and Accountability Plan
- **LEA**—local educational agency
- **PA**—Plan Approval
- **PDIS**—Plan Development and Implementation Support
- **Q & A**—Question and Answer
- **SBE**—State Board of Education
- **SISO**—School Improvement and Support Office



Housekeeping

- SISO staff can be reached by email at SISO@cde.ca.gov or by phone at 916-319-0833.
- Specific COE questions can be emailed to ESSACOE@cde.ca.gov.
- Please use the Zoom Q & A to post questions.
- Today's presentation is located at <https://www.cde.ca.gov/sp/sw/t1/csiwebinars.asp>.



FY 2023 COE Webinar Information (1)

- This year, SISO is conducting ONE combined webinar (instead of two, as in the past) to COEs receiving CSI funds for Plan Approval and/or Plan Development and Implementation Support.
- We are conducting one webinar for both subgrants because the reporting procedures and timeline in the GMART are the same.
- Today's presentation will address reporting requirements for both ESSA CSI COE subgrants.



FY 2023 COE Webinar Information (2)

- While reporting in GMART is similar for both subgrants, please note they are **separate** subgrants with different allowable uses and target audiences.
- Please see our conflict of interest guidance for more information.



Agenda

- Overview
- GMART
- Project Budget Revisions
- Expenditure Reports
- Closeout
- Apportionments
- GMART Reporting Tips
- CSI COE Resources



CSI COE Subgrants: **PDIS** and **PA**

- The Budget Act of 2023 appropriated \$5,000,000 of ESSA, Section 1003 funds to COEs to support LEAs with the **development and implementation** of their 2024–25 CSI plans in coordination with the statewide system of support.
- The Budget Act of 2023 also appropriated \$5,000,000 of ESSA, Section 1003 funds to COEs **to review and approve 2024–25 CSI plans in the CSI Prompts** of the LEA LCAPs.
- There are requirements to report expenditures for each reporting period in the GMART.



PDIS and PA Differences

Plan Support

Build LEA capacity to:

- **Collaborate** with educational partners
- **Conduct** needs assessments
- **Select** and implement EBIs
- **Use** data to monitor and evaluate
- **Review** and identify resource inequities

Plan Approval

- Review** the CSI Prompts
- Approve** the CSI Prompts

Conflict of Interest Guidance

A complete guide on how to avoid a conflict of interest with CSI funds for COEs is located on the CSI COE Program Information web page at

<https://www.cde.ca.gov/sp/sw/t1/csicoeproginformation21.asp>.

COEs are encouraged to review the posted guidance and make any appropriate changes to their policies and/or procedures, where and if needed.

An example of a potential conflict of interest is having one person work on both subgrants.



Subgrant Reporting Requirements (1)

Report Name	Reporting Data	Performance Period	Reporting Due Date
Report 1	<ul style="list-style-type: none"> Budget Revisions (BR) Expenditures (E) 	March 18, 2024, to June 30, 2024	July 15, 2024 (BR) July 31, 2024 (E)
Report 2	<ul style="list-style-type: none"> Budget Revisions Expenditures 	July 1, 2024, to September 30, 2024	October 15, 2024 (BR) October 31, 2024 (E)
Report 3	<ul style="list-style-type: none"> Budget Revisions Expenditures 	October 1, 2024, to January 31, 2025	February 15, 2025 (BR) February 28, 2025 (E)



Subgrant Reporting Requirements (2)

Report Name	Reporting Data	Performance Period	Reporting Due Date
Report 4	<ul style="list-style-type: none"> Budget Revisions Expenditures 	February 1, 2025, to June 30, 2025	July 15, 2025 (BR) July 31, 2025 (E)
Final Report and Subgrant Evaluation	<ul style="list-style-type: none"> Budget Revisions Expenditures Subgrant Performance Report (SPR) 	July 1, 2025, to September 30, 2025	October 15, 2025 (BR) October 31, 2025 (E) SPR due at Closeout



GMART Overview

- The GMART is a web-based system that:
 - Allows the COE to complete, submit, and print the application for funding.
 - Allows the COE to submit, view, and modify fiscal data, including expenditure reports.
 - Requires usernames and passwords.
- For more information, visit the CDE GMART Instructions web page located at <https://www.cde.ca.gov/sp/sw/t1/gmartinstructions.asp>.



GMART: Logging On

CDE GMART home page:

<https://www3.cde.ca.gov/gmart/gmartlogon.aspx>

Grant Management and Reporting Tool (GMART)

Logon

Username:

Password:

[GMART Instructions](#)

Refer to [Appendix 1](#) for alternative text version.



The GMART

- Usernames and passwords:
 - Are the same as in prior years.
 - Are the same for **both** subgrants.
 - Were emailed to county superintendents.
 - Are case-sensitive.
- For more information, visit the CDE GMART Instructions web page located at <https://www.cde.ca.gov/sp/sw/t1/gmartinstructions.asp>.



Selecting the Subgrant

Please select the subgrant below to begin or continue:

FY 2023–24

Plan Development and Implementation Support

FY 2023–24

Plan Approval

FY 2022–23

Plan Development and Implementation Support

FY 2022–23

Plan Approval



GMART Tabs

Grant Management and Reporting Tool (GMART)

GMART Home

Funding Application

COE Contact Info

CDE Contact Info

Project Budget

Expenditure Report

Refer to [Appendix 2](#) for alternative text version.



COE Contact Information

- Please ensure that the most accurate and recent contact information for the Primary, Secondary, and Fiscal Coordinator/s/ are always in the GMART.
- In order to edit, select the Edit Contact Information button and revise the following as appropriate:
 - First and Last Name
 - Title
 - Phone
 - Ext
 - Email
 - Fax



CDE Contact Information Tab

Grant Management and Reporting Tool (GMART)

GMART Home

Funding Application

COE Contact Info

CDE Contact Info

Project Budget

Expenditure Report

Refer to [Appendix 3](#) for alternative text version.



Project Budget Tab

Grant Management and Reporting Tool (GMART)

GMART Home

Funding Application

COE Contact Info

CDE Contact Info

Project Budget

Expenditure Report

[Logoff](#)

Refer to [Appendix 4](#) for alternative text version.



COE Allocation Amount

County Office of Education	FY 2023–24 Allocation Amount
Sample COE	\$20,188

A table of final allocation amounts is located on the CDE Funding Results web page at

<https://www.cde.ca.gov/fg/fo/r16/csicoefundingresults20.asp>.



Budget Revisions Required! (1)

ALL 2023–24 ESSA CSI COE Subgrant recipients **MUST submit a budget revision by July 15.**

Why? To reconcile the difference between the Preliminary and Final Allocations, which are pre-populated in the GMART.

This year:

- PDIS Preliminary Allocations were based on \$6,493 per CSI-eligible school in a county. Final Allocations are based on \$6,501.
- PA Preliminary Allocations were based on \$6,561 per CSI-eligible school in a county. Final Allocations are based on \$6,570.



Budget Revisions Required! (2)

Sample COE Preliminary: \$71,420 Final: \$71,521 (11 schools)

Sample COE designates half of their preliminary allocation to Object Code 4000 (\$35,710) and the other half in Object Code 5000 (\$35,710). They must edit their Project Budget because their final allocation is now \$101 more (and showing the new total in the GMART).

The COE must designate the additional funds in any Object Code, with an Expenditure Description, and submit by July 15.



Other Reasons to Submit a Budget Revision

- The COE is required to submit a Project Budget Revision when expenditure amounts claimed for Object Codes are in excess of 10 percent of the last approved budget.
- Also, the COE must submit a Project Budget Revision when there is a significant change to the description of planned expenditures.
- Note that all Project Budget Revisions must be approved by the CDE before the COE will be able to submit Expenditure Reports.



PA Project Budget Example

Object Code	Last Approved Budget	Current Expenditure Description	+/- Any Adjustments	Revised Budget Amount	Revised Expenditure Description	Revision Justification
1000-1999	0	NA	0	0	NA	NA
2000-2999	0	NA	0	0	NA	NA
3000-3999	0	NA	0	0	NA	NA
4000-4999	0	NA	0	0	NA	NA
5000-5999	\$20,000	Data Analysis Training	0	\$20,000	Conflict of Interest Training	Need to Develop Procedures
7310	\$188	Indirect Cost	0	\$188	NA	NA
5100	0	NA	0	0	NA	NA
Total:	\$20,188			\$20,188		



PDIS Project Budget Example

Object Code	Last Approved Budget	Current Expenditure Description	+/- Any Adjustments	Revised Budget Amount	Revised Expenditure Description	Revision Justification
1000-1999	\$15,000	3 FTE Staff to Coach LEAs	-\$10,000	\$5,000	1 FTE Staff to Coach LEAs	Reduce 3 FTE to 1
2000-2999	0	NA	0	0	NA	NA
3000-3999	\$5,000	Benefits	-\$4,000	\$1,000	NA	Reduce 3 FTE to 1
4000-4999	0	NA	0	0	NA	NA
5000-5999	0	NA	+\$14,000	\$14,000	Data Consultant	Data Interpretation Needed
7310	\$188	Indirect Cost	0	\$188	NA	NA
5100	0	NA	0	0	NA	NA
Total:	\$20,188			\$20,188		



Budget Revision Submission

Please provide additional remarks (if needed):

Submit Budget Revision

Show Remarks History

Export Budget to Excel

Budget History

Select an approved Budget Version:

Select...

Get Selected Version

Refer to [Appendix 5](#) for alternative text version.



Budget Revision Report Status

- 1. Project Budget Revision Pending CDE Review:** a Project Budget Revision has been submitted and the CDE is reviewing the submission.
- 2. Project Budget Revision Approved:** the Project Budget Revision has been reviewed and is approved.
- 3. Project Budget Revision Needs Revision:** the Project Budget Revision has been reviewed and requires revision.



Expenditure Report Tab

Grant Management and Reporting Tool (GMART)

GMART Home

Funding Application

COE Contact Info

CDE Contact Info

Project Budget

Expenditure Report

Refer to [Appendix 6](#) for alternative text version.



PA Example: ER 1

Object Code	Last Approved Budget	Expenditure Report 1 (3/18/24-6/30/24 Reporting Period)	COE Action
1000-1999 Certificated Salaries	\$385,000	0	Edit
2000-2999 Classified Salaries	0	0	Edit
3000-3999 Benefits	\$136,000	0	Edit
4000-4999 Books and Supplies	\$246	\$246	Edit
5000-5999 Services	\$333	\$333	Edit
7310 Indirect Cost	\$50,000	\$0	Edit
5100 (Sub-agreements over \$25,000)	0	0	Edit
Total:	\$571,579	\$579	-



PDIS Example: ER 1

Object Code	Last Approved Budget	Expenditure Report 1 (3/18/24-6/30/24 Reporting Period)	COE Action
1000-1999 Certificated Salaries	0	0	Edit
2000-2999 Classified Salaries	0	0	Edit
3000-3999 Benefits	0	0	Edit
4000-4999 Books and Supplies	0	0	Edit
5000-5999 Services	\$20,000	\$4,812	Edit
7310 Indirect Cost	\$188	\$188	Edit
5100 (Sub-agreements over \$25,000)	0	0	Edit
Total:	\$20,188	\$5,000	-



ERs 2, 3, 4, and Final

- Enter expenditure data for each Object Code.
- Enter zeroes for each Object Code if there is no expenditure data.
- Make sure there are no red error messages.
- Select the “Submit Report” button.
- Receive automated emails regarding status.



ER Submission

Please provide additional remarks (if needed):

Submit Expenditure Report

Show Remarks History

Export Expenditure to Excel

Refer to [Appendix 7](#) for alternative text version.



ER Status

- **Expenditure Report Pending CDE Review:** an Expenditure Report has been submitted and the CDE is reviewing the submission.
- **Expenditure Report Approved:** the Expenditure Report has been reviewed and is approved.
- **Expenditure Report Needs Revision:** the Expenditure Report has been reviewed and requires revision.



Closeout (1)

- When the COE has expended 100% of its funds with a \$0 cash balance, it will be prompted in the GMART to closeout.
- When the COE has \$25 or less of its final allocation amount, a pop-up message will appear giving the COE the option to closeout.
- If the COE proceeds to the Closeout section of the GMART, the Closeout Report will be viewable.



Closeout (2)

- If the COE does not want to closeout, do not select the button to proceed to the Closeout section.
- If the COE wants to closeout, complete the Closeout section and submit the report. The SISO will confirm that all requirements have been met.
- When entering expenditure data, be aware that only numbers are allowed. No decimals, commas, or dollar signs are accepted.



PDIS Closeout Prompt

There is a final evaluation prompt that must be addressed when the COE closes out in the GMART.

Instructions:

Describe the challenges and successes experienced as the CSI funds were used to build LEA capacity to develop, implement, monitor, and evaluate CSI plans designed to improve student and school outcomes.



PA Closeout Prompt

There is a final evaluation prompt that must be addressed when the COE closes out in the GMART.

Instructions:

Describe how well the COE processes worked for reviewing and approving the CSI prompts in the eligible LEA's LCAP Plan Summary.



PDIS Apportionments

First Apportionment	Reports 1 through Final
25 percent of the COE's Final Allocation	Claimed expenditures less prior payment

The CDE will apportion funds approximately 12-16 weeks after the final date of each reporting period.



PA Apportionments

First Apportionment	Reports 1 through Final
50 percent of the COE's Final Allocation	Claimed expenditures less prior payment

The CDE will apportion funds approximately 12-16 weeks after the final date of each reporting period.



GMART Reporting Tips

- The COE must confirm it is not reporting expenditures higher than its allowable indirect cost rate.
- The COE must ensure “0”s are in each Object Code series if it does not have expenditures for the reporting period.
- If the “Submit” button does not appear, scroll up and down to check for any red error messages.
- Use the Remarks box to provide additional information.
- CDE CSI COE Fiscal Reporting Instructions are located at <https://www.cde.ca.gov/sp/sw/t1/gmartcsicoeins23.asp>.



Any Questions?



Reporting Requirements Recap (1)

- **ALL** 2023–24 ESSA CSI COE subgrant recipients **MUST** submit a budget revision by July 15.
- **ALL** ESSA CSI COE subgrant recipients **MUST** submit an expenditure report by July 31.
- Zeroes can be submitted if there are no expenditures.



Reporting Requirements Recap (2)

- **ALL** reports must be submitted using the CDE GMART web page located at <https://www3.cde.ca.gov/gmart/gmartlogon.aspx>.
- The **PDIS** PCA is 15439.
- The **PA** PCA is 15565.
- The Final Report (Closeout) includes a response to an evaluation prompt in the GMART and must be completed upon closing out.



Reporting Requirements Recap (3)

The 2022–23 ESSA CSI COE subgrants:

- Started March 13, 2023.
- End September 30, 2024.
- Have optional BRs due by July 15, 2024.
- Have required ERs (Report 4) due by July 31, 2024.

The 2023–24 ESSA CSI COE subgrants:

- Started March 18, 2024.
- End September 30, 2025.
- Have required BRs due by July 15, 2024.
- Have required ERs (Report 1) due by July 31, 2024.



COE Web Page

CDE COE CSI Program Information

<https://www.cde.ca.gov/sp/sw/t1/csicoeproginformation21.asp>

Five Tabs:

- Plan Development and Implementation Support
- Plan Approval
- Conflict of Interest
- FAQs
- Resources



CDE CSI COE Resources

CDE Comprehensive Support and Improvement:

<https://www.cde.ca.gov/sp/sw/t1/csi.asp>

CDE GMART:

<https://www3.cde.ca.gov/gmart/gmartlogon.aspx>

CDE GMART Instructions:

<https://www.cde.ca.gov/sp/sw/t1/gmartinstructions.asp>

CDE CSI COE Fiscal Reporting Instructions:

<https://www.cde.ca.gov/sp/sw/t1/gmartcsicoeins22.asp>

CDE CSI COE Program Information:

<https://www.cde.ca.gov/sp/sw/t1/csicoeproginformation21.asp>



Feedback Please

- In our efforts to continuously improve, we would appreciate you completing a survey that will be emailed to you shortly from the ESSACOE@cde.ca.gov mailbox.
- The survey will be available until July 5, 2024.
- We will consider your input as we develop future webinars.



Contact Information

School Improvement and Support Office

916-319-0833

ESSACOE@cde.ca.gov

PDIS Program Lead: April Tormey ATormey@cde.ca.gov

PA Program Lead: Robert Bernstein Rbernstein@cde.ca.gov

PDIS Fiscal Lead: Steven Lawrence SLawrence@cde.ca.gov

PA Fiscal Lead: Ryan Bell Rbell@cde.ca.gov



Appendix 1 for Slide 14

Grant Management and Reporting Tool

Logon (This is the logon page).

There is a text box for the county office of education to enter its Username.

There is a text box for the COE to enter its Password.

There is a “Logon” button for the COE to select when logging on to the GMART platform.

There is a GMART Instructions link for instructions and guidance for using this online system.

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Appendix 2 for Slide 17

Grant Management and Reporting Tool

Six menu options across the top of the page which link to individual GMART pages: GMART Home, Funding Application, COE Contact Info, California Department of Education Contact Info, Project Budget, and Expenditure Report.

This is an illustration of the six tabs in the GMART.

CDE Contact Info is highlighted.

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Appendix 3 for Slide 19

Grant Management and Reporting Tool

Six menu options across the top of the page which link to individual GMART pages: GMART Home, Funding Application, COE Contact Info, California Department of Education Contact Info, Project Budget, and Expenditure Report.

CDE Contact Info is highlighted.

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Appendix 4 for Slide 20

Grant Management and Reporting Tool

Six menu options across the top of the page which link to individual GMART pages: GMART Home, Funding Application, COE Contact Info, California Department of Education Contact Info, Project Budget, and Expenditure Report.

Project Budget tab is highlighted.

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Appendix 5 for Slide 27

Please provide additional remarks (if needed).

A button is displayed with Submit Budget Revision.

A button shows Show Remarks History next to another button with Export Budget to Excel.

Budget History

Select an approved Budget Version: There is a button with Select and one with Get Selected Version.

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Appendix 6 for Slide 29

Grant Management and Reporting Tool

Six menu options across the top of the page which link to individual GMART pages: GMART Home, Funding Application, COE Contact Info, California Department of Education Contact Info, Project Budget, and Expenditure Report.

The Expenditure Report tab is highlighted.

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Appendix 7 for Slide 33

Please provide additional remarks (if needed).

A button is displayed with Submit Expenditure Report.

A button shows Show Remarks History next to another button with Export Budget to Excel.

[Return to Slide 33](#)

