# Public Charter Schools Grant Program Request for Applications

**2025–26**

**Charter Authorizer Support Initiative Local Educational Agency Contract**

*California Department of Education*

**

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## Timeline

Please note the following dates for the 2025–26 Charter Authorizer Support Initiative (CASI) Local Educational Agency (LEA) Contract Request for Applications (RFA).

| **Important Events** | **Dates** |
| --- | --- |
| Post RFA on the California Department of Education (CDE) website | January 17, 2025 |
| Technical Assistance Webinar: Overview of RFA and Budget Training | January 23, 2025 1 p.m. Pacific Standard Time (PST) |
| CASI Contract RFA application due date | **February 18, 2025** |
| CDE reviewers evaluate and score all eligible applications | February 18−March 3, 2025 (Tentative) |
| PCSGP Office notifies applicants of application status | March 4, 2025  (Tentative) |
| CDE meets with selected applicants to finalize Contract, including Scope of Work, Budget, and other documentation | March 4−31, 2025  (Tentative) |
| Proposed contract effective date | July 1, 2025 − June 30, 2026 |

## General Information

### 1. Purpose and Background

The PCSGP is a program funded by the Charter School Program (CSP), authorized under Title IV, Part C of the Elementary and Secondary Education Act (ESEA) of 1965, as amended by the Every Student Succeeds Act (ESSA) (20 U.S.C. 7221–7221j). The PCSGP is a discretionary grant program. California was awarded approximately $93.8 million in grant funds for 2024–29. The CDE must expend at least 7 percent of total grant award expenditures to provide technical assistance to eligible charter school applicants and charter school authorizers.

Under its 2020 CSP grant, the CDE provided technical assistance to charter authorizers under CASI. Additional resources related to past activities are available at [CDE CASI](https://www.cde.ca.gov/sp/ch/casi.asp). The CDE has proposed under its 2024 CSP application to continue and expand technical assistance to authorizers in order to improve the quality of authorizing and oversight of charter schools. Through the 2025–26 CASI Contract RFA, the CDE will conduct a competitive process to identify up to three LEAs with which to contract for fiscal year (FY) 2025–26 for up to $110,000 per contract, with the option to extend for FY 2026–27. Information on specific allocations is described in Section 2.2 Contract Funding Levels and Time Periods. Eligible applicants may be LEAs, including school districts and county offices of education (COEs), that currently authorize and oversee charter schools. Information on additional eligibility requirements is available in Section 2.1 Applicant Eligibility.

CASI Contracts will include the following required tasks to be conducted among the three LEA Contractors (“CASI Contractors”):

* TASK 1 – Monthly Charter Chats
* TASK 2 – Quarterly Trainings
* TASK 3 – Charter Authorizing and Oversight Trainings at Conferences
* TASK 4 – Charter Authorizing and Oversight Onsite LEA Trainings
* TASK 5 – One-on-One Authorizer Technical Assistance
* TASK 6 – Planning Meetings
* TASK 7 – Authorizer Mentorship Program

CASI Contracts, initiated as a result of this RFA, shall be contingent upon funding and program authorization provided to and by the CDE. All applications and related documents submitted in response to this RFA shall become the property of the State of California. All applications and related documents will be made available in their entirety for public inspection and reproduction. Submission of an application constitutes acceptance of these terms.

### 2. General Application Information

#### 2.1 Applicant Eligibility

The 2025–26 CASI Contract RFA is open to LEAs with direct experience authorizing and supervising active charter schools. The applicant must be legally constituted and qualified to do business within the State of California. Additionally, the primary sub-grant applicant must:

1. Provide the Unique Entity Identifier (UEI) number when applying for Federal grants. The UEI number is a mandatory field that must be entered on the Form 2 ‒ Application Cover Page. Please note that the federal government replaced the Dun and Bradstreet Data Universal Numbering System (DUNS) number with a new non-proprietary identifier, a UEI. To obtain a UEI, please visit the [System for Award Management (SAM)](https://www.sam.gov/).
2. Provide documentation of registration in the System of Award Management (SAM) and maintain an active SAM registration with current information at all times during which it has an active Federal award or an application or plan under consideration by an agency and provide its unique entity identifier in each application or plan it submits to the agency.

Applicants must have sufficient technical assistance experience to provide state-wide trainings on charter school authorizing and oversight standards. Technical assistance in charter school authorizer practices refers to skills and knowledge that address the unique needs of charter schools, including fiscal and academic accountability.

Refer to Section 5 Application Specifications for additional information pertaining to Organizational Capacity and Personnel Resources.

#### 2.2 Contract Funding Levels and Time Period

##### 2.2.1 Funding and Time Period

The goal of this RFA is to provide funding for three LEA Contractors. The term of the contract is July 1, 2025, to June 30, 2026. The total amount projected to be available for this project is $330,000. The CDE intends to fund three contracts, at $110,000 each over one FY. However, the CDE reserves the right to request budgetary revisions as a condition of funding. Information related to allowable uses of funds is provided in Section 2.3 Allowable Uses of Funds.

If insufficient funds are appropriated in the annual Budget Act for any portion of the work in this RFA, or if any other funds upon which this RFA is contingent are reduced or no longer available, the CDE may cancel the contract, or portion thereof, with no liability of any kind accruing to or against the CDE, its employees, agents, contractors, or representatives. The applicant shall not be obligated to perform any work, or the contract may be amended by the CDE and the contractor to reflect a reduction of work and the reduced appropriation subject to appropriate government agency approval.

##### 2.2.2 Option to Extend

At the sole discretion of the CDE, contracts may be extended for FY 2026–27. No contract will be extended if a contractor, or their subcontractors, has failed to meet all of the required task activities, deliverables, and reporting requirements. Unspent contract funds may not be carried over into an extension. However, new funds may be added to the contract award for additional activities through an extension.

#### 2.3 Allowable Uses of Funds

The funding for the CASI Contract may be used for the actual expenditures incurred in accordance with the rates in the approved budget, which may include the following:

* Staff salaries and benefits for all activities associated with the approved Scope of Work. Certificated/classified salaries and associated benefits charged to the contract must be documented with detailed time and effort reports for only those tasks associated with the contract.
* Travel costs, including air fare, hotel, and daily per diem, as needed to implement the Scope of Work including travel to the CDE to assist with the implementation of the technical assistance goals in the approved 2024 CSP application.
  + All travel rates may not exceed the approved State of California travel rates. See Appendix C: California State Travel Program.
* Supplies are limited to those needed to complete all of the tasks in the approved Scope of Work, such as copy and materials costs as needed to deliver technical assistance. **Equipment cannot be purchased under this contract.**
* Services and other operating expenditures must be necessary to complete all of the tasks in the Scope of Work, such as costs for hosting workshops and conferences in-person (e.g., facilities rental, audio/visual services, etc.).
  + Subcontract costs up to 25 percent of the total contract budget, with rationale for the need for subcontracted activities. Subcontractors, including all Key Personnel supported with contract funds, must be approved by the CDE prior to the execution of the contract. Any changes to subcontracting personnel, activities, or costs must be approved by the CDE prior to conducting activities.
  + Food not associated with travel costs, per diem expenses, **cannot** be charged to the contract.
  + The cost of preparing this RFA application cannot be charged to the contract.
* Indirect costs may be claimed by the **CASI Contractor only** (not subcontractors) and are limited to that LEA’s CDE-approved Indirect Cost Rate (ICR) as found on the [CDE ICR](https://www.cde.ca.gov/fg/ac/ic/) for the applicable FY in which the funds are expended. For assistance in determining indirect cost rates please email [PCSGP@cde.ca.gov](mailto:pcsgpg@cde.ca.gov).
* Other costs required to complete all of the tasks in the Scope of Work with justification provided by the Contractor, at the discretion of the CDE.

#### 2.4 Payee Data Record (STD. 204)

The Payee Data Record (STD. 204) must be fully completed, signed, and dated with an original signature on the form included with the original CASI Contract application and a copy of the form. The Payee Data Record (STD. 204) can be found at the [Department of General Services Payee Data Record (STD. 204)](https://www.documents.dgs.ca.gov/dgs/fmc/pdf/std204.pdf).

#### 2.5 Questions and Clarifications

The CDE will deliver a technical assistance webinar on the date and at the time specified on page 3, Timeline, for all interested parties. The webinar will provide information regarding the completion of the RFA and the budget forms as well as provide applicants an opportunity to ask questions of CDE staff.

#### 2.6 Cost of Preparing an Application

The costs of preparing and delivering the application are the sole responsibility of the applicant. The contract will not provide reimbursement for any costs incurred or related to the applicant’s involvement or participation in the RFA process.

### 3. Expected Outcomes

CASI Contractors will be required to provide technical assistance (TA) described in Section 5.3 Scope of Work, complete related deliverables and reports, and work in partnership with the CDE.

#### 3.1 CASI Performance Objectives and Metrics

CASI Contractors will work to support the CDE in reaching its proposed 2024 CSP performance objectives to improve authorizing quality and support the implementation of best practices for all authorizers in California. The CDE has proposed the following performance measures for FY 2025−26 authorizer TA:

1. Goal 1.1: 100 percent of authorizers will receive best practice resources and training materials via the CASI listserv.
2. GOAL 1.2: At least 68 percent of California authorizers will attend a live Authorizer TA training.
3. Goal 1.3: At least 90 percent of Authorizer TA participants who provide feedback will self-report a change in practice, policy, or reporting of data.
4. Goal 1.4: At least 55 percent of PCSGP charter school sub-grantee authorizers will attend live Authorizer TA training.

CASI performance objectives and metrics are subject to change at the discretion of the CDE. A live training may include attendance during a CASI Charter Chat, Quarterly Training, conference presentation, LEA onsite training, mentorship event, or one-on-one TA session.

#### 3.2 Contractor Responsibilities

Each CASI Contractor will be responsible for all of the following:

1. Providing a CASI Contract Monitor and appropriate Key Personnel;
   1. Identify by name the CASI Contract Monitor responsible for oversight of the contract and Key Personnel (a resume must be included for each person)
2. Creating a detailed scope of work and budget including salary and benefits for any individuals completing project tasks, associated travel costs, and supplies needed to complete the project tasks;
3. Coordinating with other CASI Contractors to plan technical assistance events and developing training materials for each; and
4. Managing contract timelines and deliverables including the following:
   1. Developing TA proposals, presentations, and handouts
   2. Tracking and analyzing data for TA event attendees
   3. Collecting and analyzing feedback from TA event attendees
   4. Quarterly progress reports
   5. Quarterly invoices, with supporting documentation
   6. Annual End of Year progress summary

CASI Contracts will be awarded only to applicants that have demonstrated the capacity to deliver the expected outcomes listed in Section 3 Expected Outcomes and Section 5.3 Scope of Work.

#### 3.4 Program and Fiscal Reporting Requirements

CASI Contract payments will be issued on a quarterly basis for services satisfactorily rendered, upon receipt and approval of required program and fiscal reporting. The CDE will not issue any advance payments.

CASI Contractors must submit quarterly task progress reports (QTPRs) to the CDE for the duration of their contract term. QTPRs must include all TA activities, participation rates, and participant feedback for the quarter being invoiced. Supporting documentation including, but not limited to, attendance rosters, feedback surveys, and presentation materials must be provided to the CDE at the time of submission.

For services satisfactorily rendered, and upon receipt and approval of quarterly invoices, the CDE agrees to compensate the CASI Contractor for actual expenditures incurred in accordance with the rates in the approved budget. The following are CDE requirements for invoices:

1. The invoice must include the correct contract number.
2. The invoice must be dated.
3. The invoice must include the receipt date of the invoice from the CASI Contractor via date stamp or date of email
4. The invoice must include the correct FY for services performed.
5. The submitted invoice must include the correct period of service within the contract period. Services performed can only be billed for in the period of service they were performed in, within the contract period.
6. The submitted invoice must be on the CASI Contractor’s letterhead.

At the time of invoice submission, CASI Contractors are required to provide supporting documentation, which may include a detailed, itemized general ledger (GL) report for the corresponding quarter; staff time and effort reporting; and/or invoices for any expenditures or subcontracting payments. The CASI Contractor is responsible for ensuring all reports are accurate, complete, and submitted on time. Failure to submit on time may result in reimbursement payments being delayed. Failure to submit QTPRs, invoices, supporting documentation, or any task deliverables may result in termination of the contract.

For services satisfactorily rendered, and upon receipt and approval of the invoices, the CDE will compensate the CASI Contractor for actual expenditures incurred in accordance with the rates specified in the approved budget. Payments generally take six to eight weeks to be processed following the approval of all submitted documents.

##### 3.4.1 Quarterly Reporting Due Dates

| **Quarter** | **Reporting Period** | **Report Due Date** |
| --- | --- | --- |
| 1 | July 1–September 30 | October 31 |
| 2 | October 1–December 31 | January 31 |
| 3 | January 1–March 31 | April 30 |
| 4 | April 1–June 30 | July 31 |

#### 3.5 Final Contractor Evaluation

In accordance with the requirements set forth in the Public Contract Code, Section 10346, the CDE shall withhold from the invoiced payment amount to the CASI Contractor, an amount equal to 10 percent of that payment. Such retained amount shall be held by the CDE and shall be released pending final completion of the agreement to the satisfaction of the CDE and completion and submission of a Contract/Contractor Evaluation form by the CDE’s Contract Monitor.

### 4. Reading and Scoring of Applications

Each element of the CASI Contract RFA application responses will be reviewed during the timeframe identified on page 3 of the RFA for the required elements that align and support the full implementation of the proposed plan. Reviewers will examine and approve applications with respect to each of the CASI Contract plan elements.

Applications will be randomly assigned to readers, taking into consideration any real or perceived conflicts of interest. Readers will base their scores on the degree to which the applicant provides evidence meeting the RFA requirements. Each application will be scored independently.

#### 4.1 Scoring Rubric

Each section of the application narrative will be evaluated and assigned a score using the CASI Contract RFA Scoring Rubric (See Appendix A: CASI Contract RFA Scoring Rubric).

The scoring system is used to signify how an application meets the funding criteria for the contract. For most narrative responses, a Likert Scale from 0 to 8 will be used as follows:

* 0–2 = Insufficient or no information provided, lacks specificity
* 3–4 = Limited, includes general information but needs additional detail, lacks specificity
* 5–6 = Adequate, includes sufficient description that includes most details
* 7–8 = Clear, provides a clear description and includes specific details

Two readers will independently review and score the applications using the scoring rubric. If two readers have scored the application and their scores do not fall within the same point range/category, then the readers will meet to discuss the scores to reach consensus, recalibrate, and re-score the application. Upon this second scoring, if the readers’ scores still do not fall within the same point range/category, then an additional reader will score the application. The additional reader’s score will be combined with one of the previous reader’s scores (whichever one is most closely aligned) to determine a final score.

Readers will be instructed to consider whether the proposed budget adequately supports the required outcomes for the contract. For example, are the number of administrative staff in the budget summary and detailed budget narrative appropriate? Is the operating expense budget justified and related to the planned program?

#### 4.2 Submission of Applications

Applicants responding to this RFA must submit one complete electronic portable document format (PDF) application packet. The application packet must include complete and unique responses to all narrative elements described within this RFA and all required forms. The application narrative response must be single-line-spaced, using default character spacing and 12-point Arial font, with one-inch margins, for a maximum of 30 pages. Applications must be submitted with all forms compiled in the order listed on the Form 1 - Application Component Checklist provided on page 28 of this RFA. Applications failing to meet these criteria or those applications with plagiarized, duplicative, or narrative statements from other PCSGP applications may be deemed ineligible.

The electronic copy, saved as one PDF file, must be emailed to [PCSGP@cde.ca.gov](mailto:PCSGP@cde.ca.gov), **no later than midnight of the listed application due date.**

#### 4.3 Appeals

If an application is deemed ineligible or not approved for funding, applicants may request an appeal of the denial within 30 calendar days following receipt of the letter of denial. The request for appeal must clearly identify a violation of the application review process as determined by State or Federal statues, rules, regulations, or guidelines governing the PCSGP in disapproving applications or failing to comply with California’s approved 2024 CSP application or program in whole or part. A request to appeal the denial of a contract should be addressed to [PCSGP@cde.ca.gov](mailto:pcsgp@cde.ca.gov).

Appeals shall be limited to the grounds that the CDE failed to correctly apply the standards for reviewing the application as specified in this RFA. The appellant must file a full and complete written appeal, including the issue(s) in dispute, the legal authority or other basis for the appeal position, and the remedy sought. The CDE will not consider incomplete or late appeals. The appellant may not supply any new information that was not originally contained in the original application.

Within 30 days after receipt of a valid appeal request, the CDE Charter Schools Division Director or their designee will make the final decision in writing. That decision shall be the final administrative action afforded the appeal. All appeal decisions will be made prior to the final approval of the contract.

### 5. Application Specifications

Each applicant must submit one electronic application with authenticated e-signatures as a single PDF document that contains all of the required items listed below.

#### 5.1 Organizational Capacity

The content of this section must describe the organizational capacity of the applicant to complete the tasks and deliverables contained in Section 5.3 Scope of Work. The content must demonstrate the applicant’s ability to provide the services set forth in this RFA and must address the following:

1. Charter School Authorization and Oversight Activities

A clear description of the LEA’s mission/vision, services, and activities related to charter schools, including a minimum of three years of recent (within the last five years) experience related to charter school authorizing/oversight. This narrative must be supported with an Organizational Capacity Portfolio (Appendix A) including high-quality evidence of the authorization and oversight activities described. The Organizational Capacity Portfolio is limited to one sample document (URLs and externally linked documents may not be reviewed), up to 10 pages per sample, per numbered or lettered item of evidence listed below:

* + 1. New charter school petition review (e.g., staff reports or recommendations substantially written by LEA staff, publicly posted authorizing board items, etc.);
    2. Charter petition renewal (e.g., staff reports or recommendations substantially written by LEA staff, publicly posted board agenda items);
    3. Material revision (e.g., staff reports or recommendations substantially written by LEA staff, publicly posted authorizing board items, etc.);
    4. Performing oversight duties of authorized charter schools which may include the following, substantially conducted by LEA staff:
       1. Schedule of annual site visits;
       2. Documentation of annual site visits (e.g., annual reports);
       3. Annual document list that each charter school must submit to the authorizing agency for review, including fiscal and academic documents, policies and procedures; and
       4. Compliant policies, procedures, and/or written description of practices.
    5. Letters and/or notices of concern, violation, investigation, and/or revocation;
    6. Description and/or documentation of how the LEA collects oversight fees from charter schools;
    7. IF APPLICABLE: An agreement and/or memorandum of understanding between the charter school and LEA that addresses facilities, including charter school use of district facilities agreements under California *Education Code* (*EC*) Section 47614 (Proposition 39); insurance; special education; or services such as nutrition, payroll, utilities, etc.
    8. IF APPLICABLE: Dashboard Alternative School Status (DASS) alternative metrics criteria; and
    9. COE APPLICANTS ONLY: Charter petitions (new or renewal) denied by a local school district (e.g., staff reports or recommendations substantially written by LEA staff, publicly posted authorizing board items, etc.).

1. Diverse Authorizing Portfolio

The application describes a diverse charter school portfolio, including the total number of active charter schools currently authorized that may be identified as:

* 1. Classroom-based;
  2. Nonclassroom-based;
  3. Below 200 in student enrollment;
  4. Above 500 in student enrollment;
  5. Affiliated with a charter management organization (CMO);
  6. Free standing (not affiliated with a CMO);
  7. School of the district for special education;
  8. Members of a charter-only Special Education Local Plan Area (SELPA) such as El Dorado Charter SELPA, Fresno County Charter SELPA, Los Angeles County Charter SELPA, Desert Mountain Charter SELPA, or Sonoma County Charter SELPA;
  9. Using district facilities under *EC* Section 47614 (Proposition 39);
  10. Not using district facilities under *EC* Section 47614 (Proposition 39);
  11. DASS;
  12. Providing instruction exclusively in partnership under *EC* Section 47605.1(f);
  13. Providing a Career Technical Education (CTE) program;
  14. Offering grade levels transitional kindergarten through grade twelve, inclusive; and
  15. Operating under a collective bargaining agreement.

1. Technical Assistance for Charter Schools and Authorizers

A clear description of the LEA’s experience with delivering free technical assistance to charter schools and charter school authorizers including frequency, format, topics, target audience, and number of participants. This narrative must be supported with a Technical Assistance Portfolio (Appendix B) including high-quality evidence of the technical assistance activities described. The Technical Assistance Portfolio is limited to up to three sample documents such as annual schedules and presentation agendas/samples (URLs and externally linked documents may not be reviewed), up to 10 pages per sample, per technical assistance category listed below:

1. Free technical assistance by LEA staff to authorized charter schools regarding state and federal statutory and regulatory requirements, oversight practices and expectations; and
2. Free technical assistance by LEA staff to other charter school authorizers regarding compliance with *EC* and best practices in charter authorizing and oversight. Topics may include oversight of charter schools providing high school or CTE programs, and schools serving English Learners, students with disabilities, and socioeconomically disadvantaged students.
3. IF APPLICABLE: Technical assistance by LEA staff provided at conferences or trainings held by the Association of California School Administrators (ACSA), California Association of School Business Officials (CASBO), California Charter Authorizing Professionals (CCAP), California Charter Schools Association (CCSA), California School Boards Association (CSBA), Charter School Development Center (CSDC), Credential Counselors and Analysts of California (CCAC), Curricular and Improvement Support Committee (CISC), National Association of Charter School Authorizers (NACSA), and/or other professional associations.
4. IF APPLICABLE: Technical assistance by LEA staff that was provided at CASI-hosted events from 2021−24.

#### 5.2 Personnel Resources

The content of this section must describe staffing capacity and how the applicant proposes to organize the staffing resources necessary to complete the tasks and deliverables contained in Section 5.3 Scope of Work. The content must demonstrate the applicant’s ability to provide the services set forth in this RFA and must address the following:

1. Agency Personnel Resources

Describe the personnel completing charter school authorizing and oversight duties on behalf of the authorizer. Identify LEA staff and their levels of experience, including, at least, the following:

* 1. 1.0 full-time equivalent (FTE) charter school oversight administrator with at least five years of experience as the full-time administrator at a district school, charter school, and/or LEA office;
  2. 3.0 FTE staff 100 percent dedicated to charter school oversight, with at least three years of experience per staff member;
  3. 1.0 FTE staff 100 percent dedicated to charter school fiscal oversight with at least three years of experience; and
  4. 1.0 FTE staff with a minimum of three years of experience with independent study programs at a charter school, district school, and/or LEA office.

1. Contract Monitor

Identify, by name, the Contract Monitor for the CASI Contract and describe how the proposed Contract Monitor meets the minimum qualifications stated below. The application must describe how the Contract Monitor will effectively coordinate, manage, and monitor the efforts of the assigned staff, including collaborating CASI Contractors, to ensure that all tasks/subtasks, activities, and functions are completed effectively and in a timely manner.

The Contract Monitor is the applicant’s primary person assigned to oversee the contract activities. The Contract Monitor must be an employee of the primary applicant and will act as the liaison between the CDE Contract Monitor and all other approved CDE staff. The Contract Monitor is responsible for ensuring completion of all CASI Contract deliverables, tasks, and subtasks.

Within the last five years, the Contract Monitor must have at least three years of experience managing a project comparable to the size and scope of the services described in this RFA.

The Contract Monitor must be accessible to the CDE Contract Monitor at all times during normal CDE business hours (See Appendix B: Definitions of PCSGP Terms for the definition of “CDE business hours”). In addition to other specified responsibilities, the Contract Monitor will be responsible for all matters related to the applicant’s contract staff/personnel including, but not limited to, the following:

* + 1. Supervising, reviewing, monitoring, training, and directing all staff/personnel completing contract activities;
    2. Maintaining contract files;
    3. Implementing and maintaining quality control procedures to manage conflicts, ensure product accuracy, identify critical reviews, and milestones; and
    4. Submitting quarterly progress reports and invoices in a timely manner.

1. Fiscal Manager Qualifications

Identify, by name, the Fiscal Manager for the CASI Contract and describe how the proposed Fiscal Manager meets the minimum qualifications stated below. The application must describe the fiscal accounting processes and budgetary controls that will be employed to ensure the responsible use and management of contract funds and accurate invoicing.

The Fiscal Manager is the applicant’s fiscal person responsible for the fiscal oversight and management, invoicing, and accounting for the entire contract.

The Fiscal Manager must have at least three years of recent experience (within the last five years) providing fiscal oversight and management of large complex contracts comparable to the size and scope of the services described in this RFA.

1. Key Personnel Qualifications

Identify, by name and job position title, all Key Personnel who will have significant responsibility for completing or assisting with the completion of tasks described in Section 5.3 Scope of Work (See Appendix B: Definitions of PCSGP Terms for the definition of “Key Personnel”).

Key Personnel are defined as those people in conjunction with the Contract Monitor who will exercise a major role on behalf of the applicant or who will have significant responsibility for completing or assisting with the completion of tasks described in this RFA. Key Personnel do not include clerical staff.

Describe in detail how the proposed Key Personnel identified above meet the minimum qualifications stated below. The application must describe the expertise and professional qualifications of all Key Personnel and how they meet the following minimum qualifications:

1. Within the last five years, a minimum of three years of experience and demonstrated work history conducting the tasks as described in this RFA.

Assigned Key Personnel must be capable of assisting the Contract Monitor in all aspects of the contract activities.

The applicant shall identify all Key Personnel proposed for each task by name, job position title, and the specific responsibilities assigned to each individual.

1. Subcontractor Qualifications

If applicable, describe any proposed activities to be subcontracted under the CASI Contract, not to exceed 25 percent of the annual budget (See Section 7.8 Potential Subcontractors for additional information). The applicant must provide a rationale for subcontracting activities and description of the organizational capacity of the subcontractor, including relevant experience conducting the tasks described in this RFA. The applicant shall identify all subcontractor Key Personnel proposed for each task by name, job position title, and the specific responsibilities assigned to each individual, and identify how subcontractor staff meet or exceed the Key Personnel minimum qualifications described above.

1. Changes to Personnel Requirements

The application must acknowledge and ensure the CASI Contractor will not change or substitute the assigned Contract Monitor, Fiscal Manager, and/or Key Personnel (including subcontractors) without the CDE Contract Monitor’s prior approval. The substitute Contract Monitor, Fiscal Manager, Key Personnel, and/or Subcontractors shall meet or exceed the qualifications and experience level of the previously assigned personnel.

1. Current Resumes

In Appendix C, provide resumes for all identified Key Personnel who will exercise a role on behalf of the applicant including, but not limited to, directing, overseeing, and/or coordinating the work of assigned staff performing tasks and activities, including subcontractors. To the extent possible, resumes should not include personal information such as social security number, home address, home telephone number, marital status, sex, birth date, etc.

#### 5.3 **Scope** of Work

The application must address all required tasks. Any deviation from the tasks and subtasks described will not be considered and may cause an application to be rejected.

##### 5.3.1 Task 1: Monthly Charter Chats

This section of the RFA narrative must acknowledge the applicant’s commitment to accomplish Task 1 and all subtasks contained herein for the duration of the contract term. Identify sufficient Key Personnel in order to accomplish all activities below:

**Task 1: Monthly Charter Chats** – CASI Contractors will develop presentation content (e.g., slide decks, speaker notes, handouts) and conduct one-hour CASI Charter Chat webinars to participants via Zoom.

* + **Content**: CASI Contractors will develop a calendar of CASI Charter Chat content for CDE review and approval. Each one-hour presentation will address legislative updates and best practices in program and fiscal oversight of charter schools based on the CASI Charter Chat calendar, with additional new material based on new legal requirements and participant requests.
  + **Why**: To improve the quality and consistency of charter school oversight through required federal CSP technical assistance.
  + **When**:Monthly (e.g., last Wednesday of the month, 10 to 11 a.m.), with one session in either November or December based on holiday schedules.
  + **Deliverables**:
    - **Training Content**: For each training conducted, CASI Contractors will provide training materials (e.g., presentation slides, handouts, resources) at least 10 business days prior to the Charter Chats for CDE review. The CDE will provide feedback within four business days and the CASI Contractors will provide revisions within two business days based on any feedback from the CDE.
    - **Post Event Data Review**: CASI Contractors will track session attendance for school districts, COEs, non-profit organizations, charter schools, and other entities. CASI Contractors will review and make available to the CDE participant feedback from each session. Quarterly, CASI Contractors will report any adjustments that will be made in response to participant feedback or attendance trends, and enact any changes based on CDE feedback.
    - **Quarterly Reports:** CASI Contractors will provide quarterly reports (by October 31, 2025; January 31, 2026; April 30, 2026; and June 26, 2026) on trainings conducted, attendance, and participant feedback. A closeout report including trainings conducted, attendance, and participant feedback from Quarter 4 as well as a summary of 2025−26 activities is due by June 26, 2026. CASI Contractors will provide revisions, if needed, based on CDE feedback.

##### 5.3.2 Task 2: Quarterly Trainings

This section of the RFA narrative must acknowledge the applicant’s commitment to accomplish Task 2 and all subtasks contained herein for the duration of the contract term. Identify sufficient Key Personnel in order to accomplish all activities below:

**Task 2: Quarterly Trainings** – CASI Contractors will develop presentation content (e.g., slide decks, speaker notes, handouts) and conduct up to half-day webinars for charter authorizer participants via Zoom.

* + **Content**: CASI Contractors will develop a calendar of CASI Quarterly Training content for CDE review and approval. CASI Contractors will develop up to half-day webinars on topics that have been reviewed and approved by the CDE Contract Monitor such as Governing Board Oversight Responsibilities and Charter Renewal, Renewal Requirements, etc.
  + **Why**: To improve the quality and consistency of charter school oversight through required federal CSP technical assistance.
  + **When**:Quarterly Trainings are scheduled to be conducted in July 2025, October 2025, January 2026, and April 2026 (dates to be determined).
  + **Deliverables**
    - **Training Content**: For each training conducted, the Contractor will provide training materials (e.g., presentation slides, handouts, resources) at least 10 business days prior to the Charter Chats for CDE review. The CDE will provide feedback within four business days and the Contractor will provide revisions within two business days based on any feedback from the CDE.
    - **Post Event Data Review**: CASI Contractors will track session attendance for school districts, COEs, non-profit organizations, charter schools, and other entities. CASI Contractors will review and make available to the CDE participant feedback from each session. Quarterly, CASI Contractors will report any adjustments that will be made in response to participant feedback or attendance trends, and enact any changes based on CDE feedback.
    - **Quarterly Reports:** CASI Contractors will provide quarterly reports (by October 31, 2025; January 31, 2026; April 30, 2026; and June 26, 2026) on trainings conducted, attendance, and participant feedback. A closeout report including trainings conducted, attendance, and participant feedback from Quarter 4 as well as a summary of 2025−26 activities is due by June 26, 2026. CASI Contractors will provide revisions, if needed, based on CDE feedback.

##### 5.3.3 Task 3: Charter School Authorizing and Oversight 101 Conference Presentations

This section of the RFA narrative must acknowledge the applicant’s commitment to accomplish Task 3 and all subtasks contained herein for the duration of the contract term. Identify sufficient Key Personnel in order to accomplish all activities below:

**Task 3: Charter School Authorizing and Oversight 101 Conference Presentations** – CASI Contractors will develop proposals for conference presentations, create presentation content (e.g., slide decks, speaker notes, handouts), and conduct presentations at conferences. Provided below is a possible list of conferences.

* + **Content**: CASI Contractors will develop a calendar of potential conferences and content to present for CDE review and approval. CASI Contractors will also develop conference proposals and presentation content on topics that have been reviewed and approved by the CDE Contract Monitor such as Governing Board Oversight Responsibilities and Charter Renewal, Renewal Requirements, Charter Authorizing and Oversight 101, etc.
  + **Why**: To improve the quality and consistency of charter school oversight through required federal CSP technical assistance.
  + **When**:The Contractor will deliver presentations during at least six conferences, which may include the following, depending on which proposals are accepted:
    - 1. Credential Counselors and Analysts of California (CCAC)
      2. Charter School Development Center (CSDC)
      3. California School Boards Association (CSBA)
      4. California Association of School Business Officials (CASBO)
      5. Curricular and Improvement Support Committee (CISC)
      6. California Charter Schools Association (CCSA)
      7. California Charter Authorizing Professionals (CCAP)
  + **Deliverables**
    - **Conference Proposals:** CASI Contractors will submit proposals for presentations for each of the conferences listed above by the deadline provided by the conference host.
    - **Training Content**: For each training conducted, CASI Contractors will provide training materials (e.g., presentation slides, handouts, resources) at least 10 business days prior to the event for CDE review. The CDE will provide feedback within four business days and CASI Contractors will provide revisions within two business days based on any feedback from the CDE.
    - **Post Event Data Review**: CASI Contractors will track session attendance for school districts, COEs, non-profit organizations, charter schools, and other entities. CASI Contractors will review and make available to the CDE participant feedback from each session. Quarterly, CASI Contractors will report any adjustments that will be made in response to participant feedback or attendance trends, and enact any changes based on CDE feedback.
    - **Quarterly Reports:** CASI Contractors will provide quarterly reports (by October 31, 2025; January 31, 2026; April 30, 2026; and June 26, 2026) on trainings conducted, attendance, and participant feedback. A closeout report including trainings conducted, attendance, and participant feedback from Quarter 4 as well as a summary of 2025−26 activities is due by June 26, 2026. CASI Contractors will provide revisions, if needed, based on CDE feedback.

##### 5.3.4 Task 4: Charter School Authorizing and Oversight 101 LEA Onsite Trainings

This section of the RFA narrative must acknowledge the applicant’s commitment to accomplish Task 4 and all subtasks contained herein for the duration of the contract term. Identify sufficient Key Personnel in order to accomplish all activities below:

**Task 4: Charter School Authorizing and Oversight 101 LEA Onsite Trainings** – CASI Contractors will coordinate onsite trainings with school district and COE charter school authorizers, develop presentation content (e.g., slide decks, speaker notes, handouts), and conduct at least three full-day trainings on charter school authorizing and oversight.

* **Content**: CASI Contractors will develop a calendar of potential LEA onsite trainings to conduct, for CDE review and approval. CASI Contractors will develop up to full-day onsite training materials for school district and COE authorizer staff on charter school authorizing and oversight topics to be reviewed and approved by the CDE Contract Monitor.
* **Why**: To improve the quality and consistency of charter school oversight through required federal CSP technical assistance.
* **When**:At least three, up to full-day trainings, dates to be determined through coordination with authorizers.
* **Deliverables**
  + **Training Content**: For each training conducted, CASI Contractors will provide training materials (e.g., presentation slides, handouts, resources) at least 10 business days prior to the training for CDE review. The CDE will provide feedback within four business days and the Contractor will provide revisions within two business days based on any feedback from the CDE.
  + **Post Event Data Review**: CASI Contractors will track session attendance for school districts, COEs, non-profit organizations, charter schools, and other entities. CASI Contractors will review and make available to the CDE participant feedback from each session. Quarterly, CASI Contractors will report any adjustments that will be made in response to participant feedback or attendance trends, and enact any changes based on CDE feedback.
  + **Quarterly Reports:** CASI Contractors will provide quarterly reports (by October 31, 2025; January 31, 2026; April 30, 2026; and June 26, 2026) on trainings conducted, attendance, and participant feedback. A closeout report including trainings conducted, attendance, and participant feedback from Quarter 4 as well as a summary of 2025−26 activities is due by June 26, 2026. CASI Contractors will provide revisions, if needed, based on CDE feedback.

##### 5.3.5 Task 5: One-On-One Technical Assistance

This section of the RFA narrative must acknowledge the applicant’s commitment to accomplish Task 5 and all subtasks contained herein for the duration of the contract term. Identify sufficient Key Personnel in order to accomplish all activities below:

**Task 5: One-On-One Technical Assistance** – CASI Contractors will conduct phone and email consultation with school district and COE charter school authorizers as needed (approximately one hour per week).

* + **Content**: Respond to questions and provide guidance to charter school authorizers on authorizing and oversight topics to be reviewed and approved by the CDE Contract Monitor.
  + **Why**: To improve the quality and consistency of charter school oversight through required federal CSP technical assistance.
  + **When**:As needed, approximately one hour per week.
  + **Deliverables**
    - **Content:** Email or phone call responses to charter authorizers, as needed.
    - **Post Event Data Review**: CASI Contractors will track the authorizers that are provided one-on-one technical assistance.
    - **Quarterly Reports:** CASI Contractors will provide quarterly reports (by October 31, 2025; January 31, 2026; April 30, 2026; and June 26, 2026) on trainings conducted, attendance, and participant feedback. A closeout report including trainings conducted, attendance, and participant feedback from Quarter 4 as well as a summary of 2025−26 activities is due by June 26, 2026. CASI Contractors will provide revisions, if needed, based on CDE feedback.

##### 5.3.6 Task 6: Planning Meetings

This section of the RFA narrative must acknowledge the applicant’s commitment to accomplish Task 6 and all subtasks contained herein for the duration of the contract term. Identify sufficient Key Personnel in order to accomplish all activities below:

**Task 6:** **Planning Meetings** – CASI Contract Monitors are required to attend the following planning meetings:

1. CASI Contractors will convene at least monthly meetings for collaboration purposes, scheduled at the discretion of the CASI Contractors. The CASI Contract Monitor for each LEA is required to attend and may bring additional staff as needed. The purpose of these meetings is for CASI Contractors to update each other on the status of CASI project activities and deliverables, collaborate on the development of CASI activities and deliverables, and prepare for meetings with the CDE. Most meetings will be no more than one hour.
2. CASI Contractors will attend monthly, virtual meetings convened by the CDE Contract Monitor prior to or following each monthly Charter Chat. The CASI Contract Monitor for each LEA is required to attend and may bring additional staff as needed. The purpose of these meetings is to update the CDE Contract Monitor on the status of CASI project activities and deliverables. Most meetings will be no more than one hour.
3. The CDE reserves the right to schedule or cancel meetings as needed. The CDE may schedule additional meetings as needed to accommodate collaboration with CDE staff, interviews with federal program monitors, or other contract management needs.

##### 5.3.7 Task 7: Authorizer Mentorship Program

This section of the RFA narrative must provide a proposal for a CASI Authorizer Mentorship Program to support new authorizing staff (e.g., staff at LEAs that have authorized their first charter in the past three years, authorizing staff with less than three years of experience) and staff at small authorizers (e.g., LEAs with less than five authorized charter schools or less than 2.0 FTE dedicated to charter authorizing and oversight). This proposal must include the following:

1. A description of key CASI Authorizer Mentorship Program activities to be offered to new authorizing staff and staff at small authorizers, including frequency of activities (e.g., monthly, quarterly, etc.), format (e.g., virtual cohort meetings, one-on-one supports), and examples of the types of content to be provided;
2. Timeline to develop and begin the implementation of the CASI Authorizer Mentorship Program in collaboration with other CASI Contractors; and
3. Identify sufficient Key Personnel in order to accomplish all activities described above.

##### 5.3.8 Benchmarks

Below is a summary of key benchmarks for contracted activities:

| **TASK** | **OCT** | **NOV** | **DEC** | **JAN** | **FEB** | **MAR** | **APR** | **MAY** | **JUN** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **1** | X | X |  | X | X | X | X | X | X |
| **2** | X |  |  | X |  |  | X |  |  |
| **3** | TBD | TBD | TBD | TBD | TBD | TBD | TBD | TBD | TBD |
| **4** | TBD | TBD | TBD | TBD | TBD | TBD | TBD | TBD | TBD |
| **5** | TBD | TBD | TBD | TBD | TBD | TBD | TBD | TBD | TBD |
| **6** | X | X | X | X | X | X | X | X | X |
| **7** | X | X | X | X | X | X | X | X | X |

#### 5.4 Budget Documents (Forms 4T, 5T, 6T)

The completed application must contain a proposed budget for the full term of the CASI Contract, itemized by task number. The proposed budget forms will be reviewed to ensure that all costs are reasonable, necessary, and allocable to the project. Information on allowable costs and instructions related to the completion of the Budget Summary (Form 4T), Budget Detail (Form 5T), and Budget Narrative (Form 6T) are available on page 33 of this RFA.

### 6. Specific Conditions and Assurances

The following are some of the specific conditions and assurances that will apply to this contract, for the awareness of applicants. Additional information will be provided to CASI Contractors during the development of the final contract.

#### 6.1 Resolution of Disputes

If the CASI Contractor disputes any action by the CDE Contract Monitor arising under or out of the performance of this contract, the contractor shall notify the CDE Contract Monitor of the dispute in writing and request a claims decision. The CDE Contract Monitor shall issue a decision within 30 days of the contractor's notice. If the contractor disagrees with the CDE Contract Monitor’s claims decision, the contractor shall submit a formal claim to the State Superintendent of Public Instruction (SSPI or Superintendent) or the Superintendent's designee. The decision of the Superintendent shall be final and conclusive on the claim unless the decision is arbitrary or capricious. The decision may encompass facts, interpretations of the contract, and determinations or applications of law. The decision shall be in writing following an opportunity for the contractor to present oral or documentary evidence and arguments in support of the claim. The contractor shall continue with the responsibilities under this agreement during any dispute.

#### 6.2 Contracts Funded by the Federal Government

It is mutually understood between the parties that this contract may have been written before ascertaining the availability of congressional appropriation of funds, for the mutual benefit of both parties, in order to avoid program and fiscal delays, which would occur if the contracts were executed after that determination was made.

This contract is valid and enforceable only if sufficient funds are made available to the CDE by the United States Government for the term covered by this agreement for the purposes of this program, including appropriation in the annual Budget Act. In addition, this contract is subject to any additional restrictions, limitations, or conditions enacted by the Congress or any statute enacted by the Congress, which may affect the provisions, terms, or funding of this contract in any manner. It is mutually agreed that if the Congress does not appropriate sufficient funds for the program, this contract shall be amended to reflect any reduction in funds. The CDE has the option to void the contract under the 30-day cancellation clause or to amend the contract to reflect any reduction of funds.

The recipient shall comply with the Single Audit Act and the reporting requirements set forth in Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, 2 *Code of Federal Regulations*, Part 200.

#### 6.3 Right to Terminate

The CDE reserves the right to terminate this contract subject to 30 days written notice to the CASI Contractor. The CASI Contractor may submit a written request to terminate this contract only if the CDE should substantially fail to perform its responsibilities as provided herein. However, the contract can be immediately terminated for cause by the CDE. The term “for cause” shall mean that the CASI Contractor fails to meet the terms, conditions, and/or responsibilities of the contract. In this instance, the contract termination shall be effective as of the date indicated on the CDE’s notification to the CASI Contractor.

This agreement may be suspended or cancelled without notice, at the option of the contractor, if the contractor’s or State’s premises or equipment are destroyed by fire or other catastrophe, or so substantially damaged that it is impractical to continue service, or in the event the contractor is unable to render services as a result of any action by any governmental authority.

#### 6.4 Prohibition Against Outside Agreements

The CASI Contractor shall not enter into agreements related to products and/or services provided under this contract with any out-of-state agency or organization. Any out-of-state agency or organization shall negotiate directly with the CDE for products and/or services pertaining to this contract.

#### 6.5 Material Developed Under the Terms of This Agreement

All materials developed under the terms of this contract shall be considered a work made for hire. The CDE, therefore, reserves the exclusive right to copyright and publish, disseminate, and otherwise use the material developed under the terms of this contract in whatever way it deems appropriate.

Any material that is not acceptable to the CDE Contract Monitor may be rejected by the CDE at its discretion. Notice of such a rejection shall be given to the CASI Contractor by the Contract Monitor within 10 days of receipt of the materials, and final payment shall not be made for such material until substantial compliance has been obtained within the time and manner determined by the CDE.

#### 6.6 Staff Replacements

The CASI Contractor will be required to obtain prior approval from the CDE Contract Monitor before changing named contract personnel. When changing or substituting named Key Personnel (including Contract Monitor, Fiscal Manager, or other Key Personnel), the CASI Contractor must obtain prior approval from the CDE Contract Monitor. The substitute personnel shall meet or exceed the qualifications and experience level of the previously assigned staff/personnel.

#### 6.7 Compliance Audit

The CASI Contractor must agree that the State or its designee will have the right to review, obtain, and copy all records pertaining to performance of the contract. The CASI Contractor must agree to provide the CDE or its designee with any relevant information requested and shall permit the CDE or its designee access to its premises, upon reasonable notice, during normal business hours for the purpose of interviewing employees and inspecting and copying such books, records, accounts, and other material that may be relevant to a matter under investigation for the purpose of determining compliance with this requirement. The CASI Contractor must further agree to maintain such records for a period of five years after final payment under the contract.

#### 6.8 Potential Subcontractors

CASI Contractors may propose to subcontract up to 25 percent of the total contract budget. The applicant must identify intended subcontractors in their application including subcontractor qualifications and the rationale for subcontracting required contract activities. Subcontractors may include other LEAs with direct experience authorizing and supervising active charter schools and non-profit organizations with direct experience supporting charter school authorizers. Non-profit organizations must be in good standing with the Secretary of State.

Nothing contained in the CASI Contract or otherwise shall create any contractual relation between the CDE and any subcontractors, and no subcontract shall relieve the Contractor of their responsibilities and obligations hereunder. The Contractor agrees to be as fully responsible to the CDE for the acts and omissions of its subcontractors and of persons either directly or indirectly employed by any of them as it is for the acts and omissions of persons directly employed by the Contractor. The Contractor's obligation to pay its subcontractors is an independent obligation from the State's obligation to make payments to the Contractor. As a result, the CDE shall have no obligation to pay or to enforce the payment of any moneys to any subcontractor.

**CASI Contract Request for Applications**

## Form 1 *–* Application Component Checklist

The following forms must be included as part of the CASI Contract application. Please type initials by each form after completion and compile the application packet in the order provided below. These forms can be downloaded at [CASI Contract Request for Applications](https://www.cde.ca.gov/fg/fo/r1/pcsgpcasi25rfa.asp).

Important: Enter the applicant’s name in the document header to ensure that all pages of the application can be traced back to the same application package.

### Form 1 – Application Component Checklist (Must include in application packet)

| **Forms** | **Required in Application** | **Initial** |
| --- | --- | --- |
| Form 1 – Application Component Checklist | Required |  |
| Form 2 – Application Cover Page  The proposed Contract Monitor must provide an authenticated e-signature. | Required |  |
| Form 3 – Application Narrative (30-page limit) | Required |  |
| Form 4T – Proposed Budget Summary (Excel Workbook) | Required |  |
| Form 5T – Proposed Budget Detail (Excel Workbook) | Required |  |
| Form 6T – Proposed Budget Narrative | Required |  |
| Form 7T – Conditions and Assurances | Required |  |
| General Assurances and Certifications | Print, Sign, Keep on site |  |
| STD. 204 State of California – Department of Finance Payee Data Record | Required |  |
| Verification of SAM registration | Required |  |
| Attachment A: Organizational Capacity Portfolio | Required |  |
| Attachment B: Technical Assistance Portfolio | Required |  |
| Attachment C: Resumes | Required |  |

**CASI Contract Request for Applications**

## Form 2 *–* Application Cover Page

Please complete the form below and the Certification, Assurance, and Signature Section on the next page:

### Form 2 – Application Cover Page

| **Required Fields** | **Applicant Information** |
| --- | --- |
| LEA Applicant Name: |  |
| Indicate Type of Agency: (COE or District) |  |
| Address: |  |
| County: |  |
| Applicant UEI Number: |  |
| Proposed Contract Monitor Name: |  |
| Proposed Contract Monitor Phone Number: |  |
| Proposed Contract Monitor Email Address: |  |
| Fiscal Manager Name: |  |
| Fiscal Manager Phone Number: |  |
| Fiscal Manager Email Address: |  |
| Number of charter schools authorized: |  |

**Form 2 *–*****Certification, Assurance, and Signature Section**

Certification/Assurance: As the duly authorized representative of the applicant, I have read all assurances, certifications, terms, and conditions associated with the Federal Charter Schools Program, and I agree to comply with all requirements as a condition of the contract.

I certify that all applicable state and federal rules and regulations will be observed and that to the best of my knowledge, the information contained in the application is correct and complete. I certify that I have been given authority to sign the CASI Contract application on behalf of my employer.

### Form 2 – Certification, Assurance, and Signature Section

| **Required Certification Field** | **Applicant Information** |
| --- | --- |
| Name of Designated Contract Monitor: |  |
| Date: |  |
| Contract Monitor Signature (Authenticated e-signature): |  |

**CASI Contract Request for Applications**

## Form 3 *–* Application Narrative

The narrative responses must address each of the areas identified in Section 5 Application Specifications. The maximum page limit for the narrative response is 30 pages. The pages must be 8.5” x 11” pages with one-inch margins, double-spaced, and 12-point Arial font. The CDE will work with the approved applicants on the formal CDE Contract development and submission process.

**CASI Contract Request for Applications**

## Forms 4T, 5T, 6T – Budget Form Instructions

The RFA applicant must complete the following Excel workbook forms: Form 4T – Budget Summary, Form 5T – Budget Detail, and Form 6T − Budget Narrative for the full contract term covered in the application. Instructions for completing the forms are included in the Excel workbook and can be downloaded at [CASI Contract Forms 4T and 5T](https://www.cde.ca.gov/fg/fo/r1/documents/CASIBudgetForm4Tand5T.xlsx).

### Object Code Budget Categories

All Budget Forms must be grouped by object code series (e.g., 1000, 2000, 3000, etc.) and must include totals by object code series and contract term. The table below explains each budget category or object code.

#### Object Code Budget Categories

| **Object Code** | **Description of the Budget Category** |
| --- | --- |
| 1000 | **Certificated Salaries:** Salaries for staff that require a credential or permit issued by the Commission on Teacher Credentialing. List all certificated employees supporting CASI Contract activities, including percentage or fraction of FTE and rate of pay per day, month, and/or annual salary. All Key Personnel charging against the CASI Contract must be named and included individually. |
| 2000 | **Classified Salaries:** Salaries for services that do not require a credential or permit issued by the Commission on Teacher Credentialing. List all classified employees supporting CASI Contract activities, including percentage of FTE, and rate of pay per day, month and/or year. All Key Personnel charging against the CASI Contract must be included, administrative support staff costs may be included without naming specific personnel. |
| 3000 | **Employee Benefits:** Record the employer’s contributions to retirement plans and health and welfare benefits. List and include the percentage and dollar amount for each employee benefit being claimed. |
| 4000 | **Books and Supplies:** Record expenditures for materials and supplies, and other non­capitalized material and supplies necessary to meet the objectives of the contract. This category also includes supplies used in support services and auxiliary programs, publications, and subscriptions necessary to operate an office to support CASI Contract activities. Equipment purchases are not allowed under this contract. |
| 5000 | **Services and Other Operating Expenditures**: Record expenditures for services, travel, and subcontracts.  **Travel and Conferences:** Include expenditures incurred under the contract for travel to provide technical assistance and professional development, including lodging, mileage, parking, bridge tolls, and/or car rental(s), necessary to meet the objectives of the program. The CDE will only reimburse up to the maximum allowable rates (see Appendix C: California State Travel Program). |
| 6000 | **Capital Outlay Equipment:** Capital Outlay is not allowable under this contract. |
| 7000 | **Indirect Costs:** Indirect costs are agency-wide, general management costs (i.e., activities for the direction and control of the agency as a whole). General management costs consist of administrative activities necessary for the general operation of the agency, such as accounting, budgeting, payroll preparation, personnel services, purchasing, and centralized data processing. All indirect costs must be charged against eligible program expenditures, in compliance with state and federal law and regulations, and aligned with standard accounting practices.  All instructional salaries and benefits, program supplies, contracts for instructional and support services, board and superintendent services, facility costs (plant maintenance and operations and facilities rents and leases), except for a minimal portion associated with the general administrative offices. This is referred to as the modified total direct costs (MTDC) base. MTDC excludes capital expenditures (objects 6000-6999), food costs (object 4700), other outgo (objects 7000-7499), other financing uses, the portion of each subagreement for services in excess of $25,000 (object 5100), and expenditures from the deferred maintenance fund, the capital facilities fund, the proprietary funds other than cafeteria, and the fiduciary funds.  Please see additional information on rates, eligible program expenditures, and other guidance at [CDE ICR Frequently Asked Questions](https://www.cde.ca.gov/fg/ac/ic/icrfaq.asp). |

### Form 4T – Budget Summary

The Form 4T – Budget Summary spreadsheet must provide a summary of proposed expenditures by object code series for the full contract term. This summary must align with the Form 5T – Budget Detail and Form 6T − Budget Narrative.

### Form 5T – Budget Detail

The Form 5T – Budget Detail spreadsheet must provide calculations by object code series for each Task 1−7. This Budget Detail must align with the Form 4T – Budget Summary and Form 6T − Budget Narrative.

### Form 6T – Budget Narrative

The Form 6T –Budget Narrative document must provide detailed descriptions by object code series and task of how the funds will be expended. The Form 6T – Budget Narrative should identify the term of the contract and include sections for each object code series. Below is a sample template:

**Form 6T – Budget Narrative**

**July 1, 2025, to June 30, 2026**

**1000 Certificated Salaries:**

**2000 Classified Salaries:**

**3000 Employee Benefits:**

**4000 General Supplies and Materials:**

**5000 Servies and Other Operating Expenses:**

**7000 Indirect:**

The Budget Narrative must include a breakdown of expenses including per unit costs, quantity, and justification for the expense. Salaries and benefits must detail who is being paid, cost per unit, and how many units to be paid.

Example:

**1000: Certificated Salaries: $22,500**

Contract Manager, Insert Contract Manager’s Name

Insert a brief description of roles and responsibilities.

Base Salary $90,000 per year x 0.25 FTE = $22,500.

* Task 1: Estimated 10 hours per month for Charter Chat content development, presentation, post event data analysis, etc.
* Task 2: Estimated 4 hours per month for Quarterly Training content development, presentation, post event data analysis, etc.
* Task 3: Estimated 5 hours per month for conferences to prepare proposals, develop conference materials, coordinate travel, conduct trainings, post event data analysis, etc.
* Task 4: Estimated 5 hours per month for LEA onsite trainings to conduct authorizer outreach, develop presentation materials, coordinate travel, conduct trainings, post event data analysis, etc.
* Task 5: Estimated 4 hours per month for One-on-One Technical Assistance to respond to authorizer questions, complete data reporting, etc.
* Task 6: Estimated 4 hours per month for Planning Meetings with CDE and CASI Contractor collaboration, plus planning and post-meeting next steps.
* Task 7: Estimated 8 hours per month for development and implementation of CASI Authorizer Mentorship Program.

**CASI Contract Request for Applications**

## Form 7T –Conditions and Assurances

### Specific Assurances

As a condition of the receipt of funds under this program, the applicant agrees to comply with the following Specific Conditions and Assurances. The signatures of the authorized agents on the front of the application indicate acknowledgement and agreement to all assurances. The applicant is required to print and retain a copy of these specific assurances at the organization site and to submit a signed copy to the CDE.

### Expenditures and Reporting

* The CSP State Entities program is authorized under Title IV, Part C of the ESEA of 1965, as amended by ESSA (20 U.S.C. 7221–7221j) and administered under the U.S. Department of Education (ED) General Administrative Regulation (EDGAR) as it relates to 34 *CFR* Parts 75–81 and 2 *CFR* Parts 200 and 3485. Expenditures shall comply with all applicable provisions of federal and state regulations and policies relating to the administration, use, and accounting for public school funds. Any interpretations of law, regulations, and procedures shall be the sole responsibility of the CDE.
* The CDE reserves the authority to require the repayment of received funds, the return of all unused funds, and/or the termination of the contract if the contractor fails to meet the terms of this agreement, fails to meet established deadlines, and/or fails to act in good faith to carry out the activities described in the contract.
* The contractor agrees to use the funding in a manner consistent with their applications as submitted, or as revised and approved by the CDE.
* The contractor agrees to fulfill the performance measures specific to its contract and to submit timely financial reports, status reports, and all other required reports. Failure to do so could result in the forfeiture of the contract.
* The contractor agrees to cooperate with the ED, the CDE, the California State Board of Education (SBE), and their independent contractors, if any, in the administration of this grant, and to conduct any external evaluation of the effectiveness of the grant process.
* Maintain fiscal procedures to minimize the time elapsing between the transfer of the funds from the CDE and disbursement.

### CASI Contract Information and Data

* The applicant will complete all data reporting requests to the CDE for CASI participant data including, but not limited to, the following:
  + List of all attendees at CASI meetings
  + List of communications with CASI participants, including dates, person contacted
* The contractor’s name will be used in all communications.
* Respond to any additional surveys or other methods of data collection that may be required for the full contract period.
* The applicant will cooperate with the ED and CDE in evaluating the federal contract program.

### Federal and State Regulations

* All audits of financial statements will be conducted in accordance with Government Auditing Standards and with policies, procedures, and guidelines established by the EDGAR, Single Audit Act Amendments, and Office of Management and Budget (OMB) Circular A-133.
* Federal regulations require contractors to establish written standards pursuant to employee conflicts of interest in awarding contracts, and written standards for resolution of any protests or disputes that arise from procurements. Regulations also provide numerous requirements in the procurement process, specifically designed to ensure proper use of public funds in an open and freely competitive environment. Information on these regulations can be found in Appendix D. Procurements that are not negotiated in accordance with federal regulations will be disallowed.
* The non-federal entity or applicant for a federal award must disclose in a timely manner, in writing to the CDE, all violations of federal criminal law involving fraud, bribery, or gratuity violations potentially affecting the federal award. Failure to make required disclosures can result in any of the remedies described in Remedies for Noncompliance 2 *CFR* Section 200.338.
* For all contractors, the following documents must be on file at their business offices: organizational charts, signed articles of incorporation, and any other organizational and governance documents of the agency.
* A copy of this RFA and the general assurances and certifications as well as other relevant materials that are referred to but not included within the RFA. This information is subject to review and verification by CDE staff.

### Specific Conditions

* Auditable records will be maintained on file for five years following the contract closing date.
* All non-federal entities expending $1,000,000 or more in combined federal funds (e.g., PCSGP and Title I funds, or American Recovery and Reinvestment Act [ARRA] funds) in a single year are required by federal law to obtain and submit a Single Audit to the Federal Audit Clearinghouse.
* Contractors may access the Federal Audit Clearinghouse web page to submit their Single Audit. The web page is available at [Federal Audit Clearinghouse](https://facweb.census.gov/uploadpdf.aspx).

#### Specific Conditions and Assurances Certification

| **Required Certification Fields** | **Applicant Information** |
| --- | --- |
| Name of LEA: |  |
| Print Name and Title of Contract Monitor or Designee: |  |
| Date: |  |
| Contract Monitor or Designee (Authenticated e-signature): |  |

## 

## Appendix A: CASI Contract RFA Scoring Rubric

1. Organizational Capacity: The content of this section must describe how the applicant demonstrates the organizational experience and capacity necessary to complete the tasks and deliverables contained in Section 5.3 Scope of Work.

Total score of 24 points possible:

### 1. Organizational Capacity

| **1. Organizational Capacity** | **CLEAR CASE**  **8–7 Points** | **ADEQUATE CASE**  **6–5 Points** | **LIMITED CASE**  **4–3 Points** | **INSUFFICIENT CASE**  **2–0 Points** |
| --- | --- | --- | --- | --- |
| A. Charter School Authorization and Oversight Activities  Score of 8 points possible: | The applicant provided a clear description of the agency’s primary purpose, services and activities related to charter schools and *e*x*ceeds* the minimum three years’ experience related to charter school authorizing/oversight.  Appendix A Organizational Capacity Portfolio contains high-quality examples of nine or more of the items listed in the RFA. COE Applicants provide a high-quality example of item 9. | The applicant provided an adequate description of the agency’s purpose and has *met* the minimum required experience with charter school authorizing and oversight.  Appendix A Organizational Capacity Portfolio contains high-quality examples of seven to eight of the items listed in the RFA. COE Applicants provide an example of item 9. | The applicant provided a limited description of the agency and has *three years* of the required experience with charter school authorizing and oversight.  Appendix A Organizational Capacity Portfolio contains high-quality examples of five to six of the items listed in the RFA. COE Applicants provide an example of item 9. | The applicant provided an insufficient description of the agency OR *does not have at least three years* of the required experience with charter school authorizing and oversight, OR Appendix A Organizational Capacity Portfolio contains high-quality examples of four or fewer of the items listed in the RFA. |
| B. Diverse Authorizing Portfolio  Score of 8 points possible: | Includes a clear description of a diverse active charter school portfolio, includes the total number of authorized schools and identifies schools that meet 12–15 of the criteria listed in the RFA. | Includes an adequate description of a diverse active charter school portfolio, includes the total number of authorized schools and identifies schools that meet 10–11 of the criteria listed in the RFA. | Includes a limited description of a diverse active charter school portfolio, includes the total number of authorized schools and identifies schools that meet eight to nine of the criteria listed in the RFA. | Includes an insufficient description OR fails to include the total number of schools OR identifies schools that meet six or fewer of the criteria listed in the RFA. |
| C. Technical Assistance to Charter Schools and Authorizers  Score of 8 points possible: | Includes a clear description of at least three years of experience with delivering professional development to charter schools and authorizers including frequency, format, topics, target audience, and number of participants.  Appendix B Technical Assistance Portfolio contains three high-quality examples of all four technical assistance categories listed in the RFA. | Includes an adequate description of at least three years of experience with delivering professional development to charter schools and authorizers including frequency, format, topics, target audience, and/or number of participants.  Appendix B Technical Assistance Portfolio contains two to three high-quality examples of three to four technical assistance categories listed in the RFA. | Includes a limited description of at least three years of experience with delivering professional development to charter schools and/or authorizers.  Appendix B Technical Assistance Portfolio contains at least two high-quality examples of at least two technical assistance categories listed in the RFA. | Includes an insufficient description, OR less than three years of experience with delivering professional development to charter schools or authorizers, OR Appendix B Technical Assistance Portfolio does not include at least two high-quality examples for technical assistance categories 1 and 2. |

2. Personnel Resources: The content of this section must describe how the applicant demonstrates the staffing experience and resources necessary to complete the tasks and deliverables contained in Section 5.3 Scope of Work.

Total score of 40 points possible:

### 2. Personnel Resources

| **2. Personnel Resources** | **CLEAR CASE**  **8–7 Points** | **ADEQUATE CASE**  **6–5 Points** | **LIMITED CASE**  **4–3 Points** | **INSUFFICIENT CASE**  **2–0 Points** |
| --- | --- | --- | --- | --- |
| A. Agency Personnel Resources  Score of 8 points possible: | Includes a clear description of the personnel completing charter school authorizing and oversight duties on behalf of the authorizer. LEA staff identified exceed the minimum levels of experience identified in the RFA. | Includes an adequate description of the personnel completing charter school authorizing and oversight duties on behalf of the authorizer. LEA staff identified meet the minimum levels of experience identified in the RFA. | Includes a limited description of the personnel completing charter school authorizing and oversight duties on behalf of the authorizer. LEA staff identified meet the minimum levels of experience identified in the RFA. | Includes an insufficient description of LEA personnel, OR duties are conducted by contractors, OR staff identified fail to meet the minimum levels of experience identified in the RFA. |
| B. Contract Monitor Qualifications  Score of 8 points possible: | Includes a clear description of the person identified to act as the Contract Monitor outlining how they *exceed* the minimum three years’ experience coordinating, managing, and monitoring projects and staff of a similar size and scope. Resume is included and supports the description. | Includes an adequate description of the person identified to act as the Contract Monitor outlining how they *meet* the minimum years of experience coordinating, managing, and monitoring projects and staff of a similar size and scope. Resume is included and supports the description. | Includes a limited description of the person identified to act as the Contract Monitor and their experience with projects and staff of a similar size and scope. Resume is included and supports the description. | Includes an insufficient description of the person identified to act as the Contract Monitor OR their experience with projects and staff of a similar size and scope is insufficient OR missing resume. |
| C. Fiscal Manager Qualifications  Score of 8 points possible: | Includes a clear description of the person identified to act as the Fiscal Manager outlining how they *exceed* the minimum three years’ experience managing a project of similar size and scope. The fiscal and budgetary processes are described. Resume is included and supports the description. | Includes an adequate description of the person identified to act as the Fiscal Manager outlining how they *meet* the minimum years of experience managing a project of similar size and scope. The fiscal and budgetary processes are described. Resume is included and supports the description. | Includes a limited description of the person identified to act as the Fiscal Manager outlining their experience managing a project of similar size and scope. Resume is included and supports the description. | Includes an insufficient description of the person identified to act as the Fiscal Manager OR their experience with projects and staff of a similar size and scope is insufficient OR missing resume. |
| D. Key Personnel Qualifications  Score of 8 points possible: | Includes a clear description of sufficient Key Personnel support for activities described in the RFA and how they *exceed* the minimum three years’ experience required to complete required tasks. Resume(s) included and support the description. | Includes an adequate description of any Key Personnel and how they *meet* the minimum years of experience required to complete required tasks. Resume(s) included and support the description. | Includes a limited description of any Key Personnel and their experience related to completing the required tasks. Resume(s) included and support the description. | Includes an insufficient description of the Key Personnel OR their experience with projects and staff of a similar size and scope is insufficient OR missing resume(s). |
| E. Subcontractor Qualifications (if applicable)  **Not included in total score but must meet Adequate Case Standard** | Includes a clear description of the subcontractor Key Personnel names, positions, tasks to be assigned, and clear justification for the use of the proposed subcontractor. Describes how the subcontractor exceeds the minimum qualifications. Resume(s) included and support the description. | Includes an adequate description of the subcontractor Key Personnel names, positions, tasks to be assigned, and an adequate justification for the use of the proposed subcontractor. Describes how the subcontractor *meets* minimum qualifications. Resume(s) included and support the description. | Includes a limited description of the subcontractor Key Personnel names, positions, tasks to be assigned, and a limited justification for the use of the proposed subcontractor. Subcontractor *meets* minimum qualifications. Resume(s) included and support the description. | Insufficient description of subcontractor Key Personnel, positions, tasks, or insufficient justification for the use of the subcontractor, OR subcontractor fails to meet minimum qualifications OR missing resume(s). |
| F. Staffing Changes  Score of 8 points possible: | The application must specify that the applicant will comply with the Changes to Personnel Requirements. | Not Applicable | Not Applicable | The application does not specify compliance with Changes to Personnel Requirements. |

3. Scope of Work: The applicant must describe how they will meet all of the requirements stated for the Section 5.3 Scope of Work tasks identified in the RFA.

Total score of 32 points possible:

### 3. Scope of Work

| **3. Scope of Work** | **CLEAR CASE**  **4 Points** | **ADEQUATE CASE**  **3 Points** | **LIMITED CASE**  **2 Points** | **INSUFFICIENT CASE**  **1–0 Points** |
| --- | --- | --- | --- | --- |
| A. Task 1 - Monthly Charter Chats | Includes a clear plan to accomplish Task 1 and all subtasks contained herein for the duration of the contract term. Identifies sufficient Key Personnel to accomplish all activities. | Includes an adequate plan to accomplish Task 1 and all subtasks contained herein for the duration of the contract term. Identifies sufficient Key Personnel to accomplish all activities. | Includes a limited plan to accomplish Task 1. Key Personnel may not be adequate to accomplish all activities. | Includes an insufficient plan to accomplish Task 1. Key Personnel are unlikely to accomplish all activities. |
| B. Task 2 – Quarterly Trainings | Includes a clear plan to accomplish Task 2 and all subtasks contained herein for the duration of the contract term. Identifies sufficient Key Personnel to accomplish all activities. | Includes an adequate plan to accomplish Task 2 and all subtasks contained herein for the duration of the contract term. Identifies sufficient Key Personnel to accomplish all activities. | Includes a limited plan to accomplish Task 2. Key Personnel may not be adequate to accomplish all activities. | Includes an insufficient plan to accomplish Task 2. Key Personnel are unlikely to accomplish all activities. |
| C. Task 3 – Conference Presentations | Includes a clear plan to accomplish Task 3 and all subtasks contained herein for the duration of the contract term. Identifies sufficient Key Personnel to accomplish all activities. | Includes an adequate plan to accomplish Task 3 and all subtasks contained herein for the duration of the contract term. Identifies sufficient Key Personnel to accomplish all activities. | Includes a limited plan to accomplish Task 3. Key Personnel may not be adequate to accomplish all activities. | Includes an insufficient plan to accomplish Task 3. Key Personnel are unlikely to accomplish all activities. |
| D. Task 4 – LEA Onsite Trainings | Includes a clear plan to accomplish Task 4 and all subtasks contained herein for the duration of the contract term. Identifies sufficient Key Personnel to accomplish all activities. | Includes an adequate plan to accomplish Task 4 and all subtasks contained herein for the duration of the contract term. Identifies sufficient Key Personnel to accomplish all activities. | Includes a limited plan to accomplish Task 4. Key Personnel may not be adequate to accomplish all activities. | Includes an insufficient plan to accomplish Task 4. Key Personnel are unlikely to accomplish all activities. |
| E. Task 5 – One-on-one Technical Assistance | Includes a clear plan to accomplish Task 5 and all subtasks contained herein for the duration of the contract term. Identifies sufficient Key Personnel to accomplish all activities. | Includes an adequate plan to accomplish Task 5 and all subtasks contained herein for the duration of the contract term. Identifies sufficient Key Personnel to accomplish all activities. | Includes a limited plan to accomplish Task 5. Key Personnel may not be adequate to accomplish all activities. | Includes an insufficient plan to accomplish Task 5. Key Personnel are unlikely to accomplish all activities. |
| F. Task 6 – Planning Meetings | Includes a clear plan to accomplish Task 6 and all subtasks contained herein for the duration of the contract term. Identifies sufficient Key Personnel to accomplish all activities. | Includes an adequate plan to accomplish Task 6 and all subtasks contained herein for the duration of the contract term. Identifies sufficient Key Personnel to accomplish all activities. | Includes a limited plan to accomplish Task 6. Key Personnel may not be adequate to accomplish all activities. | Includes an insufficient plan to accomplish Task 6. Key Personnel are unlikely to accomplish all activities. |
| **3G. Task 7** | **CLEAR CASE**  **8–7 Points** | **ADEQUATE CASE**  **6–5 Points** | **LIMITED CASE**  **4–3 Points** | **INSUFFICIENT CASE**  **2–0 Points** |
| G. Task 7 – Authorizer Mentorship Program | Includes a clear plan for a CASI Authorizer Mentorship Program to support new authorizing staff and staff at small authorizers including:  Description of key activities with frequency, format, and sample content;  Timeline; and  Personnel to accomplish all activities. | Includes an adequate plan for a CASI Authorizer Mentorship Program to support new authorizing staff and staff at small authorizers including:  Description of key activities with frequency, format, and sample content;  Timeline; and  Personnel to accomplish all activities. | Includes a limited plan for a CASI Authorizer Mentorship Program to support new authorizing staff and staff at small authorizers including:  Description of key activities;  Timeline; and  Personnel to accomplish all activities. | Includes an insufficient plan for a CASI Authorizer Mentorship Program, which may have missing or insufficient description of key activities, timeline, or personnel. |

4. Budget: The Budget Forms 4T Budget Summary, 5T Budget Detail, and 6T Budget Narrative must demonstrate how the applicant would effectively conduct all required activities in the Section 5.3 Scope of Work.

Total score of 16 points possible:

### 4. Budget

| **4. Budget** | **CLEAR CASE**  **8–7 Points** | **ADEQUATE CASE**  **6–5 Points** | **LIMITED CASE**  **4–3 Points** | **INSUFFICIENT CASE**  **2–0 Points** |
| --- | --- | --- | --- | --- |
| A. Budget Overview  Score of 8 points possible: | The Budget Summary, Budget Detail, and Budget Narrative Costs are clear and aligned. | The Budget Summary, Budget Detail, and Budget Narrative Costs are aligned. | Minor revision may be required to ensure that all Budget Forms are aligned. | Major revisions may be required to ensure that all Budget Forms are aligned, OR costs exceed the $110,000 annual allocation. |
| B. Budget Narrative  Score of 8 points possible: | The Budget Forms provide a clear, itemized projection of expenditures that are sufficient to conduct all required activities. Strong detail is provided to ensure that expenditures are allowable, reasonable, allocable, and necessary to achieve the goals of CASI. | The Budget Forms provide an adequate itemized projection of expenditures that are sufficient to conduct all required activities. Sufficient detail is provided to ensure that expenditures are allowable, reasonable, allocable, and necessary to achieve the goals of CASI. | The Budget Forms provide a limited itemized projection of expenditures that are sufficient to conduct all required activities. Additional detail may be needed to ensure that expenditures are allowable, reasonable, allocable, and necessary to achieve the goals of CASI. | The Budget Forms provide insufficient itemized detail, OR costs are not allowable, reasonable, or necessary, OR staffing may be insufficient to achieve all goals. |

## Appendix B: Definitions of PCSGP Terms

**Applicant:** Name listed for “LEA Applicant Name” on the applicant’s Form 2 – Application Cover Page, a component of the completed CASI Contract RFA application.

**Authorizing Agency:** A California school district, county office of education (COE), or the California State Board of Education (SBE) that has approved a charter petition, directly or on appeal.

**CDE Business Hours:** The hours the CDE staff at large are available to the public, 8 a.m. to 5 p.m. Pacific Standard Time (PST)/Pacific Daylight Time (PDT).

**CDE Work Day:** The days Monday through Friday, inclusive, but exclusive of CDE-observed holidays.

**Charter Management Organization (CMO):** A non-profit organization that operates or manages a network of charter schools linked by centralized support, operations, and oversight (Elementary and Secondary Education Act [ESEA] Section 4310[3]).

**Charter Developer:** An individual or group of individuals (including a public or private non-profit organization), which may include teachers, administrators and other school staff, parents, or other members of the local community in which charter school work will be carried out (ESEA Section 4310[5]).

**Charter School:** A public school that provides instruction in any transitional kindergarten (TK) through grade twelve and is approved by an authorized public chartering agency as a charter school under the provisions of *EC* Section 47600 et. seq.

**Charter Schools Program (CSP) State Entity Grant:** A United States Department of Education (ED) administered discretionary grant program. Awarded states distribute sub-grants to charter school developers to assist in the development and initial operations of newly established or conversion charter schools and provide technical assistance to authorizing agencies and charter schools.

**Classroom-based:** A program that requires pupils to be engaged in educational activities under the immediate supervision and control of an employee of the charter school who possesses a valid teaching certification. (Also, referred to as site-based.) See *EC* Section 47612.5(e)(1).

**Contract:** The requirements set forth in this RFA submitted by the applicant, incorporated CDE forms, and approved and executed by the CDE, Department of General Services, and all other required parties.

**Conflict of Interest:** Charter school and non-profit public benefit corporation board members are regarded as governmental representatives and as such are subject to provisions of the Fair Political Practices Act and federal regulations found in 34 *Code of Federal Regulations* (*CFR)* Section 75.525.

**ED:** The Federal Department of Education.

**Elementary and Secondary Education Act (ESEA):** The Elementary and Secondary Education Act of 1965. ESEA is the primary federal legislation for primary (elementary) and secondary education in the United States.

**Every Student Succeeds Act (ESSA):** The Every Student Succeeds Act was signed into law on December 10, 2015, and reauthorized the ESEA.

**Fiscal year:** The state fiscal year (FY) is July 1 through the following June 30.

**Grantee:** For the purposes of this RFA and the PCSGP, the CDE is the “grantee.”

**Key Personnel:** Defined as those people in conjunction with the Contract Monitor who will exercise a major management and/or administrative role on behalf of the applicant (directing, overseeing and/or coordinating the work of assigned staff, subcontractors, and/or independent consultants performing tasks and activities) or who will have significant responsibility for completing or assisting with the completion of tasks described in this RFA. Key Personnel do not include clerical staff.

**Local educational agency (LEA):** A COE, school district, state special school, or direct-funded charter school as described in *EC* Section 47651.

**Nonclassroom-Based Charter School:** A program that does not meet the requirements defined for a classroom-based program. (Also referred to as non-site based.) See *EC* Section 47612.5(e)(2).

**Non-Federal Entity:** A state, local government, Indian Tribe, institution of higher education (IHE) or non-profit organization that carries out a federal award as a recipient or sub-recipient.

**Non-Profit Charter School Authorizer Support Organization or Association:** A non-profit organization whose mission is to educate and provide technical assistance, professional development, and resources to charter school authorizers related to charter petition review and charter school oversight.

**Pass-Through Entity:** A non-federal entity that provides a sub-award to a sub-recipient to carry out part of a federal program.

**Procurement:** Any formal requisition process used to acquire goods and services that may involve the use of purchase orders, invoices, subcontracts, and approvals by any level of hierarchy at the grantee’s agency.

**Public Charter Schools Grant Program (PCSGP):** The CDE’s implementation of the federal CSP State Entity grant, see CSP State Entity grant.

**Single Audit:** All non-federal entities expending $1,000,000 or more in **combined** federal awards (e.g., PCSGP and Title I funds, or American Recovery and Reinvestment Act [ARRA] funds) in a single fiscal year are required by federal law to obtain and submit a Single Audit to the Federal Audit Clearinghouse. PCSGP sub-grant recipients required to file federal Single Audits must submit a copy of the reporting package to the CDE Charter Schools Division as a PCSGP performance benchmark. Further information may be found at [U.S. Department of Education Office of Inspector General: Single Audits](https://oig.ed.gov/non-federal-audits/single-audits).

**Specifications:** The minimum specifications required by the CDE for a task, subtask, or activity. Specifications provided in this RFA represent a comprehensive outline of the detail required in the applicant’s application for successful accomplishment of a task, subtask, or activity.

**State Education Agency (SEA):** For the purposes of this RFA, the SEA is the SBE.

**Subcontractor:** Any and all agreement(s) between an applicant and another LEA, non-profit organization, or individual for the accomplishment of any task, subtask or activity, in whole or in part, described in this RFA, or to provide goods or services in support of the work described in this RFA.

**Sub-Grant:** The requirements set forth in a PCSGP Sub-Grant RFA, such as sub-grants for the Planning, Implementation, Replication, and Expansion of charter schools.

**Sub-Grantee:** The successful applicant selected by the CDE as the entity to administer its application and subsequent sub-grant to support the accomplishment of any tasks described in a PCSGP Sub-Grant RFA.

## Appendix C: California State Travel Program

### Travel and Per Diem Limitations

A summary of the State of California Short-Term Travel Expense Reimbursement Program Administered by the California Department of Human Resources (CalHR).

Reimbursement for travel is governed by the terms of the current Memorandum of Understanding and the applicable *Government Code* sections and CalHR Rules. Reimbursement for transportation expenses will be based on the method of transportation that is in the best interest of the state, considering both direct expense and the employee's time. Rates, time frames, and requirements are applicable to all contractors and subcontractors. Additional details applicable to the travel reimbursement program may be found in the *California Code of Regulations*, Title 2, Division 1, Chapter 3, Article 2 (requirements applicable to excluded employees).

All travel rates included in this proposal must be based on current state approved rates and are subject to change. Contractor will be paid the current state rates as established by the CalHR. Additional information is available at [CalHR Travel Reimbursements](https://www.calhr.ca.gov/employees/pages/travel-reimbursements.aspx).

### Conditions of Travel

Reimbursement shall not be made for meal and lodging expenses incurred within 50 miles of home or headquarters (of the CASI Contractor). The CDE may approve meals and/or lodging for employees *on travel status* away from, but within 50 miles of, home or headquarters. Delegation does not extend to the approval of meals or lodging at either the home or headquarters location.

### Out of State Travel

Not allowable under this contract

### Out of Country Travel

Not allowable under this contract

### Receipts/Miscellaneous

Receipts are required for each item for expense for street car, ferry fares, bridge and road tolls, local transit, taxi, shuttle, or hotel bus, and parking over $10, business phone calls over $5, all gas for rental cars and all lodging, regardless of amount.

Keep all receipts. The CDE may require submission of receipts with invoices. All business expenses are to be incurred as a result of conducting state business and are subject to review/verification by the CDE.

Contractors/subcontractors are subject to the same rules and requirements if they are reimbursed for travel. Meals when the individual is not on travel status and refreshments or break service at meetings are not reimbursable.