

PINELLAS COUNTY SCHOOLS



Charter School Handbook TITLE II & TITLE IV

**A GUIDE FOR PARTICIPATING
CHARTER SCHOOLS**

TITLE II

Supporting Effective Instruction

TITLE IV

Student Support and Academic Enrichment

**PCS
SPECIAL
PROJECTS
DEPARTMENT**

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Section 1

GENERAL INFORMATION

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GENERAL INFORMATION

Overview

Activities supported with Title II or Title IV funds must be in addition to, not in place of, what the school would otherwise provide. It would be supplanting to use Title II or Title IV funds to provide services or resources a charter school should provide in the absence of these funds.

Title II: Supporting Effective Instruction	Title IV: Student Support and Academic Enrichment
<u>Purpose:</u> • Increase student achievement consistent with the challenging state academic standards. • Improve the quality and effectiveness of teachers, principals and other school leaders. • Increase the number of teachers, principals, and other school leaders who are effective in improving student academic achievement in schools. • Provide low-income and minority students with greater access to effective teachers, principals and other school leaders.	<u>Purpose:</u> • Provide students with access to a well-rounded education. • Improve safe and healthy school conditions for student learning. • Improve the use of technology to increase the academic achievement and digital literacy of all students.

Charter School Participation in Title II and Title IV

Section 1002.33, F.S., Charter schools. “(17) FUNDING. —Students enrolled in a charter school, regardless of the sponsorship, shall be funded as if they are in a basic program or a special program, the same as students enrolled in other public schools in the school district. Funding for a charter lab school shall be as provided in s.1002.32. (c) Pursuant to 20 U.S.C. 8061 s.10306, all charter schools shall receive all federal funding for which the school is otherwise eligible, not later than 5 months after the charter school first opens and within 5 months after any subsequent expansion of enrollment.

Intent to Participate

Charter schools must decide annually if they wish to participate in Title II and Title IV in the following school year. The process is known as “Intent to Participate” and the details are explained in the next section of this manual.

Period of Allowability

Federal funds must be **obligated during the grant’s period of availability**, which is typically **12 months**. For example, if a grant is awarded for FY 2025 (July 1, 2025 – June 30, 2026), all obligations must be made within that timeframe.

GENERAL INFORMATION

Determining Allocations

Charter schools receive proportionate funding. Allocations are based on the district's total allocation, less administrative costs, which provides a per pupil rate. The district determines the amount of funds available for proportionate funding by calculating, on a per-pupil basis, the amount available for all public and charter school students as well as participating private school students. This method is used for both Title II and Title IV funds.

Option to Pool Funds - Collaborative Activities Involving Multiple Charter Schools

Schools may choose to collaboratively participate in activities by "pooling" their allocated funding. This can be accomplished by designating one individual to serve as the contact person for specific activities, who will work with the Special Projects office to implement the spending process. Principals of participating schools will be required to submit written authorization for pooling school allocations for specific activities.

GENERAL INFORMATION

Roll Forward

In general, to ensure that proportionate funds are provided in a timely manner, a district must obligate the funds allocated under all applicable programs in the year for which they are appropriated (ESEA sections 1117(a)(4)(B) and 8501(a)(4)(B)). There may be extenuating circumstances, however, in which a district is unable to obligate all funds within this timeframe in a responsible manner. Under these circumstances, the funds may remain available for the provision of equitable services under the respective program during the subsequent school year. In determining how such carryover funds will be used, the district must consult with appropriate charter school officials (ESEA sections 1117(b) and 8501(c)).

Reimbursement Process

Unless otherwise mutually agreed to by the charter school and the district, and consistent with state and federal rules and regulations governing the use and disbursement of federal funds, the district shall reimburse the charter school monthly for invoices submitted by the charter school for federal funds available.

To be reimbursed, any expenditures made by the charter school must comply with all applicable state rules and federal regulations, including, but not limited to, the applicable federal Office of Management and Budget Circulars; the federal Education Department General Administrative Regulations; and program-specific statutes, rules, and regulations. Such funds may not be made available to the charter school until a plan is submitted to the district for approval of the use of the funds, in accordance with applicable federal requirements. The district will review and approve plans promptly or provide guidance on necessary revisions to include in grant applications.

Record Keeping

While the district will work to not overburden a charter school in paperwork, the district is fiscally responsible for the management of funds, and as such, the district may require the charter school to submit necessary documentation to determine student and teacher needs, as well as documentation to determine that the activities and expenses are allowable, reasonable and necessary, and in accordance with any and all federal and state requirements.

Procurement

Because charter schools independently initiate purchases and the district subsequently reimburses those expenditures with federal funds, it is essential that all charter school procurement activities fully comply with applicable federal, state, and local requirements. Adherence to these standards ensures that all reimbursed costs are allowable, properly documented, and auditable under the Uniform Guidance (2 CFR Part 200) and the Education Department General Administrative Regulations (EDGAR). Additionally, charter schools must adhere to the following procurement standards and procedures:

Procurement - IT Governance

The Pinellas County Schools (PCS) Information Technology (IT) governance (ITGov) process guides the acquisition and implementation of technology (including both hardware and software) for its schools. Because PCS reimburses charter schools for their Title II and Title IV expenditures, charter schools will need to ensure that purchases and governance of hardware and software must adhere to state and federal laws as well as individual charter purchasing policies.

Section 2

THE PROCESS

This section includes:

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[The Needs Assessment](#)

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THE PROCESS

Notification

The Elementary and Secondary Education Act (ESEA), amended by Every Student Succeeds Act of 2015 (ESSA), requires that school districts contact appropriate officials of all charter schools within the district annually to determine if they want their schools to participate in available grant programs, regardless of whether those officials have recently indicated any interest in program participation. Pinellas County Schools will notify all charter schools each spring to ensure they are aware of next year's funding opportunities, timelines, and processes.

Intent to Participate

Intent to Participate forms are sent to charter schools annually, during the month of December. Schools will receive the form and relative timelines from Special Projects and will need to respond with what programs they wish to participate in or do not wish to participate in for the following school year. A charter school has the choice to submit a reimbursement plan for Title II and Title IV services OR to participate in activities offered by the district.

The Needs Assessment

Charter schools' use of Title II and Title IV funds should be based on a documented Needs Assessment that is aligned to a strategic participation plan. Information from the Needs Assessment is used in the development of the district's Title II & Title IV applications. Participating schools must submit a Needs Assessment to the Special Projects office for review and approval prior to conducting any activity. The Needs Assessment workbook also contains a budget that should directly relate to the needs identified. Activities that are not aligned to the school's Needs Assessment, and not included in the Needs Assessment workbook, will not be approved for reimbursement. Charter schools will have multiple opportunities in the school year to make amendments to their Needs Assessment workbook and budget. After these amendments are submitted and approved by the state, schools will be able to spend funds and request reimbursement on their approved activities.

Needs Assessment Components

The six components of the Needs Assessment are:

1. Briefly summarize the school's Needs Assessment process.
2. Identify your students' needs (academic, social-emotional, physical health, digital literacy) that emerged from the process described above. Provide appropriate data for support.
3. Identify your professional development needs, related to addressing the student needs identified above.
4. Describe the programs, services, or other activities the school intends to implement to address the identified needs.
5. Provide outcome objectives for activities to be funded through Title II, Part A and/or Title IV, Part A. Describe the plan for determining the extent to which these services & programs contributed to addressing needs identified above.
6. Provide a budget for allocating Title II & Title IV funds. Budgets must include all travel plans, particularly any out-of-state travel requests, consultant contracts, & specific technology purchases. Budgets should be highly specific & detailed.

THE PROCESS

Needs Assessment Submissions

Needs Assessments and budgets are submitted to Special Projects using Smartsheet. Templates and links to submit are found on the Special Projects website at: <https://www.pcsb.org/Page/38061>

Needs Assessments will be collected/edited at application time in March/April. Then there will be opportunities to amend it in Fall, Winter, and/or Spring. Schools will receive email notification the month prior, so they will have an opportunity to request changes to their budget.

Charter School Reimbursements

Receipts documenting expenditures for **approved** activities, along with a memo requesting reimbursement on school letterhead, and an Itemized Expenditure Report (IER) should be submitted through Smartsheet. Templates and links to submit are found on the Special Projects website at: <https://www.pcsb.org/Page/38061>

A reimbursement check for **approved** activities will be processed and issued to the school. The process for reimbursement may take up to 3 weeks.

LEA's reimburse charters for pre-approved grant activities. All activities must meet R.A.N criteria (Reasonable, Allocable, Necessary), meet criteria in 2CFR Part 200, and meet the requirements of the particular grant, and follow PCS expense guidelines/limits. **Schools should invoice expenses on a monthly basis.**

Documentation Required

1. Cover letter

All cover letters must include the following attestation statement. [See cover letter example.](#)

I, _____ (principal/administrator), certify to the best of my knowledge and belief that the information provided herein is true, complete, and accurate. I am aware that the provision of false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil, or administrative consequences including, but not limited to violations of U.S. Code Title 18, Section 2. 1001, 1343 and Title 31, Sections 3729-3730 and 3801-3812.

[name of school] further attests that this request for reimbursement is for valid expenditures and complies with all applicable state rules and federal regulations, including, but not limited to, the applicable federal Office of Management and Budget Circulars; the federal Education Department General Administrative Regulations; and program-specific statutes, rules, and regulations. The school further states that these expenditures are necessary, reasonable, and allocable to achieving the grant objectives.

THE PROCESS

2. Invoice

The school will provide an invoice for the total amount to be reimbursed. The Excel template is for itemizing each expense. Each individual expense should be listed on a separate line. The total of all lines should equal the invoice total. Every invoice must have an Excel support document. [See Excel Invoice Template.](#)

3. Proof of payment

Proof of payment support documentation options are listed for three types of expenditures:

- Payroll expenditures for internal staff
- Vendor payments for invoiced products and services
- Merchant receipts for P-Card or vendor check purchases

4. Personal Identifying Information

Charter schools should not include PII for staff or students.

Section 5

THE RESOURCES

This section includes:

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[Documents and Forms](#)

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Important Dates

September	Fall Charter School Consultation
December	Intent to Participate Forms mailed for NEXT fiscal year
January	Intent to Participate Forms due to the Special Projects office
March	Spring Charter School Consultation
April	Last day to update current fiscal year Title II/Title IV Needs Assessment
May	Deadline to submit NEXT fiscal year Needs Assessment
July	Deadline for receipt of Title II/Title IV reimbursement paperwork for current school year (Grants end June 30)

Current Fiscal Year	Start Date											
	JULY	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
New Fiscal Year	Grant Awarded											
	Amendment 1											
Current Fiscal Year	Intent to Participate											
	Amend. Awarded											
New Fiscal Year	Amendment 2											
	Consultation											
Current Fiscal Year	Amend. Awarded											
	Amendment 3											
New Fiscal Year	Allocations Given											
	Needs Asses DUE											
Current Fiscal Year	Application Due											
	End Date											

Documents and Forms

Documents and Forms for Charter School participation in Title II and Title IV can be accessed on the Special Projects Website using the following link:

<https://www.pcsb.org/Page/38061>



Pinellas County Schools

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Students

Community

Staff

SCHOOLS

Q

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Driver Education

Early Childhood

Elementary School Education

Exceptional Student Education

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Charter Schools

Welcome to the Special Projects Department Resource Center for Charter Schools!

We are committed to supporting charter schools through every step of the grant process. Our team works closely with charter school administrators to ensure all necessary approvals are obtained and that grant applications meet the requirements of both district and state guidelines. We also offer expert guidance on managing and utilizing grant funds effectively, in compliance with all relevant policies and manage the reimbursement process.

Please explore the options on the left to find the assistance you need!

Sample Charter Reimbursement Letter

[Click for cover letter example.](#)

EXAMPLE – GRANT FUNDS REIMBURSEMENT COVER LETTER

SCHOOL LETTERHEAD

Date:

RE: Request for Reimbursement

Grant Name (e.g. Supp School Improvement, Title II, UniSIG)

Description of Purpose (e.g., February expenses)

Total reimbursement amount: \$XXXX.XX

Attached to this reimbursement request are the following:

1. Invoice and itemized listing using Excel template
2. Proof of payment for each itemized expense

I, _____ (principal/administrator), certify to the best of my knowledge and belief that the information provided herein is true, complete, and accurate. I am aware that the provision of false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil, or administrative consequences including, but not limited to violations of U.S. Code Title 18, Section 2. 1001, 1343 and Title 31, Sections 3729-3730 and 3801-3812.

[name of school] further attests that this request for reimbursement is for valid expenditures and complies with all applicable state rules and federal regulations, including, but not limited to, the applicable federal Office of Management and Budget Circulars; the federal Education Department General Administrative Regulations; and program-specific statutes, rules, and regulations. The school further states that these expenditures are necessary, reasonable, and allocable to achieving the grant objectives.

Sincerely,

[Manual/electronic signature]

Principal/Administrator typed name

Itemized Expenditure Report

[Link for Excel Invoice Template](#)

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✕ ✓ *fx*

Instructions:

List each expenditure on a separate line (add more lines as needed).

Select dropdown list values for columns B, E and J.

Adequate support documentation is required for all expenditures.

Taggable assets include student laptops/chromebooks and capitalized equipment (>\$1,000).

	A	B	C	D	E	F	G	H	I	J
1	Itemized Expenditure Report									
2	Instructions: List each expenditure on a separate line (add more lines as needed). Select dropdown list values for columns B, E and J. Adequate support documentation is required for all expenditures. Taggable assets include student laptops/chromebooks and									
3										
4										
5										
6										
7										
8	Contact name:									
9	Contact phone number:									
10	Contact email address:									
11										
12	Function Code	Type of Pmt (Select)	Vendor/Employee/Merchant	Description	Taggable Assets?	Payment Date	Check Number or Payment ID	Total Amount of Expenditure	Amount Requested for Reimbursement	Documentation (Yes/No)
13	5100	Employee Payroll	Teacher Jones	Math intervention for 3rd grade	No	4/1/2020	V123999	\$2,000	\$2,000	Yes
14										
15										
16										
17										
18										
19										
20										
21										
22										
23										
24										
25										
26										
27										
28										

Charter Reimbursement for Grants- Smartsheet Submission

Please email Jessica Soto, sotoj@pcsb.org or Ellen Truskowski, truskowskie@pcsb.org.

Charter School Reimbursement for Grants

School Name

Grant

FY

Reimbursement Amount Requested

Needs Assessment

Submitted By: Name

Submitted by: Email

Upload All Documentation Here *

Please include the following:
1) Cover letter requesting reimbursement signed by the principal
2) Excel spreadsheet – itemized expenditures
3) Documentation/Evidence that each line item on spreadsheet has been paid.



Drop your files here
[Browse](#)

K-12 ESEA Common Federal Program Guidance Contracted Services



Guidance

For contracted services that do not exceed \$3,000 per full day of service, a contract shall be submitted for review at the time of the request. If a contract is not available to submit for review at the time of the request, a detailed scope of work or proposed contract of services must be provided. The submission must include a purpose, rationale, projected number of individuals to be served, and a cost breakdown of the services to be performed to determine if the request is allowable, reasonable and necessary. Materials to support the services may be requested as an additional expense. Any contracted service requested in excess of \$3,000 per full day of service, including travel, will be presumed unreasonable.

*If an extenuating circumstance requires a contracted service in excess of \$3,000 per full day, an **ESEA Contracted Services Extenuating Circumstance Request form** located on www.FloridaCIMS.org must be submitted to the Bureau of Federal Educational Programs at BFEP@fldoe.org.*

Reflections

The following six considerations shall strategically guide and support LEAs in their review of ALL contracted services, not dependent on requested amount:

1. The services shall correlate to the district's strategic plan or professional learning plan;
2. The provider shall provide their qualifications including experience, evidence of effectiveness and impact on student achievement so the LEA can project a Return On Investment (ROI);
3. The LEA shall review how the service was funded in previous year(s), if a previous provider and the plan to sustain or narrow the services in the event of a decrease or absence of funds;
4. The LEA shall review the proposed contract or scope of work and confirm it includes the start and end date, the number of days/hours, and the proposed services with a detailed explanation and cost breakdown of each service and how it is reasonable;
5. The LEA shall project the number of participants and their roles (school and district administration, teachers and coaches), as well as the number of students who will benefit from the adult learning; and
6. The LEA shall identify how the services will be embedded into ongoing professional learning as well as the plan to build internal capacity to continue to support the learning.

**** Source Document: FDOE 2024-2025 Federal Programs Companion Guide**