



OREGON  
DEPARTMENT OF  
EDUCATION

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# PUBLIC CHARTER SCHOOL EQUITY GRANTS 2025-27 BIENNIUM



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## Background

During the 2021 regular legislative session, HB 2166, now [ORS 327.362](#), became law. This bill includes a variety of high-priority initiatives for Oregon and authorizes the Department of Education to award grants from the Statewide Education Initiatives Account to certain eligible public charter schools.

[Public Charter School Equity Grant Website](#)

## Purpose

The purpose of the grant is to increase academic achievement, including reducing academic disparities for focal groups defined as students with disabilities<sup>1</sup> (they must have an IEP), or students from racial or ethnic groups experiencing academic disparities<sup>2</sup>. These include American Indian and Alaska Native students, Black and African American students, Hispanic and Latino students, Native Hawaiian and Pacific Islander students, and multiracial students. District-identified racial groups are not included in the Charter School Equity Grant to keep eligibility measurement data consistent from school to school.

## Longitudinal Performance Growth Targets (LPGTs)

This grant is designed to align closely with the Student Investment Account (SIA) Grant programs, activities, progress markers, local optional metrics, and Longitudinal Performance Growth Targets to reduce the burden and redundancy to charter schools.

Charter school **Equity Grant applications** may use one of the following options:

- LPGTs or progress markers identified in their SIA Grant Agreement/Amendment

The following two options require reliable sources of progress measures and must include third-grade reading proficiency and regular attendance rates as defined in [ORS 327.190](#). Other metrics identified in collaboration may be used.

- Local optional metrics or targets identified within their contract with their sponsor.
- New LPGTs identified in collaboration with the Oregon Department of Education during

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<sup>1</sup> [OAR 581-014-0001](#) Students with Disabilities means a child with a disability as defined in ORS 343.035

<sup>2</sup> [OAR 581-017-0765\(6\)](#)

the **grant agreement phase**.

## Timeline

The Oregon Department of Education (ODE) timeline is contingent on the Legislative adoptive budget and is subject to change.

The ODE's **estimated** planned timeline is as follows:

### Year 1

- **February 2025** – Statewide Notice of Charter Schools eligible to participate in Charter School Equity Grant Published through Gov Delivery System and to Charter School Leaders.
- **February – March 1:** Notice to eligible charter schools with the release of preliminary estimated allocations using 2024 Spring Membership data (additional data will be used if there are charter schools in their first year of operation e.g. Fall Membership Data 2023, Special Education Child Count Data as of December 1, 2023).
- **March 2025:** Intent to Utilize due back from eligible charter schools with a request for their charter contract with their sponsoring district if the contract has been renewed since the last application cycle. ODE must allow two weeks to return the Intent to Utilize form.
- **March 2025:** Application and budget template sent to eligible schools who submitted an Intent to Utilize form. Eligible schools will have until May 1, 2025, to complete and return their application and budget. New schools in operation beginning in 2024 will have a different application and budget timeline.
- **April 2025:** If any new schools begin operation this year, we will publish a final release of eligible charter schools with their preliminary estimated allocations. Intent to utilize forms will be sent to newly eligible schools from this data. ODE must allow two weeks to return the Intent to Utilize form.
- **April 2025:** Application and budget templates will be sent to new schools.
- **May 2025:** Review of applications, and communications with schools if needed.
- **May 30, 2025:** Final applications and budget templates from new schools beginning operation this year are due.
- **June 2025:** Review of any applications and budget templates from new schools (if needed).
- **June 30, 2025:** Legislative budget adopted – final allocations determined and communicated to charter schools.

- **June-July 2025:** Work with ODE procurement to develop grant agreements. LPGTs will not be developed this biennium for an additional two years, however, the schools will still be responsible to the targets they set during the 23-25 IG application or independently with ODE for future years.
- **August 2025:** Grant agreements finalized (depending on procurement timeline).

## Year 2

- **March 2026:** Run 2<sup>nd</sup> Year ADMw from 2025 Spring Membership Data. Notify schools of adjustments to budget in year two and to prepare for budget/activity changes.
- **May/June 2026:** Finalized ADMw for Year 2. Develop Grant Amendments for all schools.
- **July 2026:** All claims for Year 1 must be submitted to EGMS
- **August 1, 2026:** Programmatic report template sent to all schools.
- **August 30, 2026:** Fiscal Report due for Year 1 through desk audit request.
- **September 30, 2026:** Programmatic report due for Year 1
- **June 30, 2027:** All spending must be complete for the grant (Years 1 and 2).
- **August 15, 2027:** Deadline to submit any EGMS claim for the 25-27 biennium
- **August 30, 2027:** Fiscal Report due for Year 1 through desk audit request.
- **September 30, 2027:** Programmatic report due for Year 2

## Eligible Applicants

To be eligible, a charter school must not be a virtual charter school and must have at least 65% of the total student population composed of students from the following groups:

581-017-0765 (6) Charter School Equity Grant Definition

*(6) "Racial or ethnic groups that have historically experienced academic disparities" includes American Indian and Alaska Native students, Black and African American students, Hispanic and Latino students, Native Hawaiian and Pacific Islander students, and multiracial students.*

## Grant Funding

Charter School Equity Grants will be funded through the Statewide Education Initiatives Account of the Student Success Act. \$4,300,000 was appropriated for the 2025-27 biennium from the Governor's budget. This is a preliminary estimated number and is contingent on the final Legislative budget due June 30, 2025. This grant will be available in the fall of 2025. During each two-year grant cycle, a list of eligible charter schools will be published once and funding allocations will be calculated annually at 49% for year one and 51% for year two. Grant awards are calculated based on the charter school ADMw<sup>3</sup> and the difference between the State School Funding a district receives on behalf of the charter school vs what the charter school contractually receives. Future funds are anticipated at approximately \$4,000,000 per biennium for a continuation of \$2,000,000 per year adding the current service level to each biennium.

## Recipient Allocations

Published preliminary estimated allocations to eligible charter schools can be found on our website [here. \(update when allocations are ready\)](#)

## Reallocation and Prorating Funds

If a charter school chooses not to participate in this grant program, its funding will be reallocated to the recipients who did apply for the grant by the application deadline. This will be done using the same formula as the initial allocations. Updated allocation amounts will be posted after the funds have been redistributed. This will ensure the available funds are used to the maximum extent possible.

This grant will be prorated<sup>4</sup> if we are over-subscribed. For example, if we have \$2.5 million in need, but only have \$2 million in grant funds, we will apply a prorate for all eligible grantees equitably to balance available resources.

## Eligible Uses of Funds

### Guiding Principles and Considerations

- Budget requests must align with state and federal laws and guidance.
- If using funds for summer school enrichment programs or activities they should be offered through existing recipients, programs, or community programming as an extension or enhancement of services similar to SIA grant allowable use.
- Grant funds may not be used for capital expenses (facility improvement, property

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<sup>3</sup>OAR 581-0765(4)(6)(8)

The ADMw is taken from the previous year's Fall Membership derived from the 1st period cumulative average daily membership collection and the Spring Membership report derived from the 3rd period cumulative average daily membership collection and the December Special Education Child Count Data Report.

<sup>4</sup>OAR 581-017-0774(5)

purchase, maintenance, rental fees)

- If using funds for class-size reduction, they must be targeted or focused on using evidence-based criteria to ensure appropriate student-teacher ratios or staff caseloads similar to SIA requirements. No universal class size reduction use is allowed.

This grant is intended to fund activities that increase academic achievement and reduce disparities for the focal student groups identified. We expect the use of creative and innovative practices to expand existing programs or develop new programs to meet these goals.

This grant allows for broad use of funds and five percent (5%)<sup>5</sup> of the total expenditures can be used for administrative expenses (indirect costs). No allowable use categories will be developed at this time.

## Expenditure Period

Grant funding is available for any eligible use of funding incurred between **July 1, 2025**, and **June 30, 2027**.

## Grant Procedures

To participate in the Charter School Equity Grant, all recipients must complete an intent to utilize form sent to all eligible charter schools within two weeks of receiving it from the Oregon Department of Education. Applications will be sent to eligible charter schools in early March 2025 and are due no later than May 1, 2025. The application will require a description of how the grant money will be used to advance the purpose of the grant to increase academic achievement and reduce academic disparities for the focal groups described earlier in this document. A budget form will be required and include activities used to achieve these goals and specify which programs or activities you may be expanding from the SIA-funded activities/strategies. If using goals or targets from the charter school sponsor contract, or the development of new growth targets during the grant agreement phase, they will need to include 3rd-grade reading proficiency and attendance. Additional metrics may apply after those initial metrics are addressed.

Once applications are accepted, recipients must enter into a grant agreement with ODE that outlines eligible uses, program requirements, and reporting requirements for grant funding. Grant agreements will be executed at a date to be determined by procurement.

## Program Requirements

We will utilize the Oregon Department of Education [Electronic Grants Management System](#) (EGMS). Grant spending must be completed by June 30, 2025. You have an additional 45-day

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<sup>5</sup> OAR 581-017-0774(6)

grace period to submit reimbursement claims to EGMS by August 15, 2025.

EGMS reimbursement claims must be submitted at least quarterly, so we ensure grantees are on track to spend the grant throughout the year. Financial reporting and backup documentation for the grant will include documentation in a shared Google expenditure worksheet that must accompany each EGMS quarterly claim. Charter school grant managers must update the appropriate columns in the expenditure worksheet to reflect those expenses by category (staffing, supplies, curriculum, etc.). For charter schools using grant funds for summer school, the EGMS claims may be submitted when ready. The grant manager will check EGMS quarterly to approve claims. If a grantee requests to submit reimbursements off of this schedule, the grantee must email the grant manager for approval of a different approval/reimbursement schedule.

At the end of the year when the final reporting and expenditure worksheets are reviewed with EGMS claims and reconciled to expenses charged to the grant; if any expenses are deemed not reasonable, or out of the scope of the approved expenses per your grant agreement, then reimbursement may be required to cover those costs.

Each charter school will need to have an EGMS account and one or two staff members approved to submit claims on your school's behalf. If you are not set up in EGMS, please connect with the grant manager to start this process.

## Reporting Requirements

No later than **September 30** of each year, recipients will provide an annual report that includes a description of the following:

- How grant money received was used to increase academic achievement, including reducing academic disparities for students from racial or ethnic groups that have historically experienced academic disparities and students with disabilities.
- How grant money met Longitudinal Performance Growth Targets or progress markers in the grant agreement.
- How progress was made by the recipient toward Longitudinal Performance Growth Targets or progress markers.
- Reconciled year-end budget showing documentation for expenditures.
- To the greatest extent practicable:
  - The Oregon Department of Education (ODE) will accept information for reporting in a manner that is made available by a public charter school to the sponsor of the public charter school.
  - Any requirements prescribed by ODE or the State Board of Education (SBE) with an application, grant agreement, or submission of information shall reduce any redundancies between a grant awarded for the Charter School Equity grant and a grant awarded from the Student Investment Account (SIA). This may include any applicable forms or information submitted by the



public charter school to ODE or a school district from the SIA grant.

Fiscal reporting will be completed through site visit desk audits and end-of-the-year desk audits due on August 30 of each year. These audits will randomly choose expenditures for various months and activities and require backup documentation for all expenses chosen. A reimbursement form will be required with each EGMS claim to further verify the requested reimbursements are for allowable uses and align with the application and budget document spending plan submitted for the biennium.

## Plan Update

Grantee may expend Grant funds that differ from the amounts shown for each category or line item shown in the Project budget included in Exhibit A (the “Budget”) by up to and including 25% without the prior consent of the Agency’s Grant Manager. Grantee may expend Grant Funds that differ from the amounts shown for each category or line item in the Budget by more than 25% with the prior written approval of the Agency’s Grant Manager, as long as the total amount expended for all Project activities paid for with Grant Funds does not exceed the total amount of the grant award. If any changes need to be made to the plan, please email the Grant Manager and make notes on the budget template in the budget notes section for any adjustments.

## Site Visits

The contract agreement requires one site visit per grant cycle for each participating charter school. Site visits will be scheduled with each school by the grant manager for a time that’s mutually agreeable with ODE and the individual charter school. A general site visit will include the following essential components:

1. Tour of the school that highlights the relevant grant-funded programming and staffing (15-30 minutes)
2. Meeting with administration and grant management staff (60 minutes)
3. Review of desk audit documentation and expenditure records (15-30 minutes)
4. Discussion of data and LPGTs
5. Meeting with staff funded by the grant to review their outcome progress

Some possible additional components may include observing programs supported by grant funds, participating/observing in school activities, and meeting with other relevant staff. Site visits must be scheduled between 9 a.m. – 4 p.m. and be no longer than six hours total. If there are any activities scheduled for outside of regular business hours, please talk to the ODE grant manager in advance to set up.

Before the site visit, the following pre-work will be completed by the grantee and ODE grant

manager.

1. Pre-visit (ODE grant manager will set this up with each charter school about four weeks before the visit)
  - a. Discuss format
  - b. Agree upon components
  - c. Agree upon appropriate artifacts and opportunities for observation
  - d. Review Google Drive to be used for the site visit
2. Desk Audit Review (completed by \_\_\_\_\_)
  - a. ODE staff will review the budget, grant materials, and expenditures to identify questions and areas of focus for the visit.
  - b. ODE staff will notify the grantee of grant financial records to be reviewed during the site visit.
  - c. ODE staff will identify any areas of interest to observe during the site visit.
3. In-Person Site Visit Schedule/Agenda (to be created by Grantee one week before the visit)
4. Report Back (within four weeks of the site visit)
  - a. ODE staff will draft a summary of the site visit and share it back with the charter school. The report will include the following:
    - i. General observations
    - ii. Highlights and commendations
    - iii. Areas of improvement if needed for grant implementation