

# 2024–25 Comprehensive Support and Improvement County Office of Education Reporting Webinar



School Improvement and Support Office

June 25, 2025

# Acronyms (1)

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



# Acronyms (2)

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



# Housekeeping

- SISO staff can be reached by email at [SISO@cde.ca.gov](mailto:SISO@cde.ca.gov) or by phone at 916-319-0833.
- Specific COE questions can be emailed to [ESSACOE@cde.ca.gov](mailto:ESSACOE@cde.ca.gov).
- Please use the Zoom Q & A to post questions.
- Today's presentation is located on the CDE ESSA School Support Webinar Resources web page at: <https://www.cde.ca.gov/sp/sw/t1/essawebinars.asp>.



# FY 2024 COE Webinar Information (1)

- The SISO is conducting ONE webinar to COEs receiving CSI funds for Plan Approval and/or Plan Development and Implementation Support.
- We are conducting one webinar for both subgrants because the reporting procedures and timeline in the GMART are the same.
- Today's presentation will address reporting requirements for both ESSA CSI COE subgrants.



# FY 2024 COE Webinar Information (2)

- While reporting in the GMART is similar for both subgrants, please note they are **separate** subgrants with different allowable uses and target audiences.
- Please see our Conflict of Interest guidance for more information. (The link is on slide 10).



# Agenda

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



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

- The Budget Act of 2024 appropriated \$5,000,000 of ESSA, Section 1003 funds to COEs to support LEAs with the **development and implementation** of their 2025–26 CSI plans in coordination with the statewide system of support.
- The Budget Act of 2024 also appropriated \$5,000,000 of ESSA, Section 1003 funds to COEs **to review and approve 2025–26 CSI plans via the CSI Prompts** of the LEA LCAPs.
- There are requirements to report expenditures for each reporting period in the GMART.



# PDIS and PA Differences

## Plan Support

Build LEA capacity to:

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

## Plan Approval

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

# Conflict of Interest Guidance

A complete guide on how to avoid a conflict of interest with CSI funds for COEs is located on the CSI COE Program Information web page at <https://www.cde.ca.gov/sp/sw/t1/csicoeproginformation21.asp>.

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

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



# Subgrant Reporting Requirements (1)

Report Name	Reporting Data	Performance Period	Reporting Due Date
Report 1	<ul style="list-style-type: none"> <li>Budget Revisions (BR)</li> <li>Expenditures (E)</li> </ul>	March 17, 2025, to June 30, 2025	July 15, 2025 (BR) July 31, 2025 (E)
Report 2	<ul style="list-style-type: none"> <li>Budget Revisions</li> <li>Expenditures</li> </ul>	July 1, 2025, to September 30, 2025	October 15, 2025 (BR) October 31, 2025 (E)
Report 3	<ul style="list-style-type: none"> <li>Budget Revisions</li> <li>Expenditures</li> </ul>	October 1, 2025, to January 31, 2026	February 15, 2026 (BR) February 28, 2026 (E)



# Subgrant Reporting Requirements (2)

Report Name	Reporting Data	Performance Period	Reporting Due Date
Report 4	<ul style="list-style-type: none"> <li>Budget Revisions</li> <li>Expenditures</li> </ul>	February 1, 2026, to June 30, 2026	July 15, 2026 (BR) July 31, 2026 (E)
Final Report and Subgrant Evaluation	<ul style="list-style-type: none"> <li>Budget Revisions</li> <li>Expenditures</li> <li>Subgrant Performance Report (SPR)</li> </ul>	July 1, 2026, to September 30, 2026	October 15, 2026 (BR) October 31, 2026 (E)  SPR due at Closeout



# GMART Overview

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



# GMART: Logging On

CDE GMART home page:

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

Grant Management and Reporting Tool (GMART)

Logon

Username:

Password:

[GMART Instructions](#)

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



# The GMART

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



# Selecting the Subgrant

Please select the subgrant below to begin or continue:

**FY 2024–25**

**Plan Development and Implementation Support**

**FY 2024–25**

**Plan Approval**

**FY 2023–24**

**Plan Development and Implementation Support**

**FY 2023–24**

**Plan Approval**



# GMART Tabs

## Grant Management and Reporting Tool (GMART)

GMART Home

Funding Application

COE Contact Info

CDE Contact Info

Project Budget

Expenditure Report

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



# COE Contact Information

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



# CDE Contact Information Tab

## Grant Management and Reporting Tool (GMART)

GMART Home

Funding Application

COE Contact Info

CDE Contact Info

Project Budget

Expenditure Report

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



# Project Budget Tab

## Grant Management and Reporting Tool (GMART)

GMART Home

Funding Application

COE Contact Info

CDE Contact Info

Project Budget

Expenditure Report

[Logoff](#)

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



# COE Allocation Amount

County Office of Education	FY 2024–25 Allocation Amount
Sample COE	\$20,188

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

<https://www.cde.ca.gov/fg/fo/r16/csicoefundingresults24.asp>.



# Reasons to Submit a Budget Revision

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



# PA Project Budget Example

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



# PDIS Project Budget Example

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



# Budget Revision Submission

Please provide additional remarks (if needed):

Submit Budget Revision

Show Remarks History

Export Budget to Excel

## Budget History

Select an approved Budget Version:

Select...

Get Selected Version

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



# Budget Revision Report Status

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



# Expenditure Report Tab

## Grant Management and Reporting Tool (GMART)

GMART Home

Funding Application

COE Contact Info

CDE Contact Info

Project Budget

Expenditure Report

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



# PA Example: ER 1

Object Code	Last Approved Budget	Expenditure Report 1 (3/17/25-6/30/25 Reporting Period)	COE Action
1000-1999 Certificated Salaries	\$385,000	0	Edit
2000-2999 Classified Salaries	0	0	Edit
3000-3999 Benefits	\$136,000	0	Edit
4000-4999 Books and Supplies	\$246	\$246	Edit
5000-5999 Services	\$333	\$333	Edit
7310 Indirect Cost	\$50,000	\$0	Edit
5100 (Sub-agreements over \$25,000)	0	0	Edit
<b>Total:</b>	<b>\$571,579</b>	<b>\$579</b>	<b>-</b>



# PDIS Example: ER 1

Object Code	Last Approved Budget	Expenditure Report 1 (3/17/25-6/30/25 Reporting Period)	COE Action
1000-1999 Certificated Salaries	0	0	Edit
2000-2999 Classified Salaries	0	0	Edit
3000-3999 Benefits	0	0	Edit
4000-4999 Books and Supplies	0	0	Edit
5000-5999 Services	\$20,000	\$4,812	Edit
7310 Indirect Cost	\$188	\$188	Edit
5100 (Sub-agreements over \$25,000)	0	0	Edit
<b>Total:</b>	\$20,188	\$5,000	-



# ERs 2, 3, 4, and Final

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



# ER Submission

Please provide additional remarks (if needed):

Submit Expenditure Report

Show Remarks History

Export Expenditure to Excel

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



# ER Status

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



# Program Cost Account (PCA)

Subgrant	PCA	Resource
CSI COE PDIS	15439	3183
CSI COE PA	15565	3183
CSI LEA	15438	3182

Refer to [Appendix 8](#) for alternative text version.



# Closeout (1)

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



# Closeout (2)

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



# PDIS Closeout Prompt

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

## **Instructions:**

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



# PA Closeout Prompt

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

## **Instructions:**

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



# Track Your Spending!

- Every COE should spend their entire subgrant amount by the end of the subgrant.
- If funds are leftover at the end of the subgrant, the COE will be prompted to provide additional information regarding why they did not spend their entire allocation.
- In addition, CDE staff may schedule informational meetings to discuss spending with COEs throughout the subgrant period as well as before and/or after closeout.



# PDIS Spending Cycle

- Most COEs receiving PDIS funds use the funds throughout the subgrant cycle (reporting some expenditures in each reporting period).
- Support to LEAs with CSI-eligible schools looks different with each LEA that a COE supports.
- Each CSI-eligible school is in a different place regarding its improvement efforts, from initial data analysis with educational partners to determine root causes of identification, to researching EBIs, to monitoring progress, and evaluating how to abandon, adapt, or adopt as necessary.



# PA Spending Cycle

After completing the CSI Plan, LEAs must complete the CSI required prompts within the LCAP.



COEs review and approve CSI Prompts within the LCAP.



COEs provide a list of LEAs who have approved CSI Prompts to CDE.



CDE Provides the list of LEAs with approved CSI Prompts to SBE for their approval.

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Refer to [Appendix 9](#) for alternative text version.



# PDIS Apportionments

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

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



# PA Apportionments

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

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



# GMART Reporting Tips

- The COE must confirm it is not reporting expenditures higher than its allowable indirect cost rate.
- The COE must ensure “0”s are in each Object Code series if it does not have expenditures for the reporting period.
- If the “Submit” button does not appear, scroll up and down to check for any red error messages.
- Use the Remarks box to provide additional information.
- CDE CSI COE Fiscal Reporting Instructions are located at <https://www.cde.ca.gov/sp/sw/t1/gmartcsicoeins24.asp>.



**Any Questions?**



# Reporting Requirements Recap (1)

- 2024–25 ESSA CSI COE subgrant recipients may submit budget revisions by July 15, 2025, if necessary.
- **ALL** ESSA CSI COE subgrant recipients **MUST** submit expenditure reports by July 31, 2025.
- Zeroes can be submitted if there are no expenditures.



# Reporting Requirements Recap (2)

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



# Reporting Requirements Recap (3)

## **The 2023–24 ESSA CSI COE subgrants:**

- Started March 18, 2024.
- End September 30, 2025.
- Have optional BRs due by July 15, 2025.
- Have required ERs (Report 4) due by July 31, 2025.

## **The 2024–25 ESSA CSI COE subgrants:**

- Started March 17, 2025.
- End September 30, 2026.
- Have optional BRs due by July 15, 2025.
- Have required ERs (Report 1) due by July 31, 2025.



# COE Web Page

## CDE COE CSI Program Information

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

### Five Tabs:

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



# CDE CSI COE Resources

CDE Comprehensive Support and Improvement:

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

CDE GMART:

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

CDE GMART Instructions:

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

CDE CSI COE Fiscal Reporting Instructions:

<https://www.cde.ca.gov/sp/sw/t1/gmartcsicoeins24.asp>

CDE CSI COE Program Information:

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



# Feedback Please

- In our efforts to continuously improve, we would appreciate you completing a survey that will be emailed to you shortly from the [ESSACOE@cde.ca.gov](mailto:ESSACOE@cde.ca.gov) mailbox.
- The survey will be available until July 10, 2025.
- We will consider your input as we develop future webinars.



# Contact Information

## School Improvement and Support Office

916-319-0833

[ESSACOE@cde.ca.gov](mailto:ESSACOE@cde.ca.gov)

PDIS Program Lead: April Tormey [ATormey@cde.ca.gov](mailto:ATormey@cde.ca.gov)

PA Program Lead: Robert Bernstein [RBernstein@cde.ca.gov](mailto:RBernstein@cde.ca.gov)

PDIS Fiscal Lead: Steven Lawrence [SLawrence@cde.ca.gov](mailto:SLawrence@cde.ca.gov)

PA Fiscal Lead: Ryan Bell [RBell@cde.ca.gov](mailto:RBell@cde.ca.gov)



# Appendix 1 for Slide 14

Grant Management and Reporting Tool

Logon (This is the logon page).

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

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

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

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

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# Appendix 2 for Slide 17

## Grant Management and Reporting Tool

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

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

CDE Contact Info is highlighted.

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# Appendix 3 for Slide 19

## Grant Management and Reporting Tool

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

CDE Contact Info is highlighted.

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# Appendix 4 for Slide 20

## Grant Management and Reporting Tool

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

Project Budget tab is highlighted.

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# Appendix 5 for Slide 25

Please provide additional remarks (if needed).

A button is displayed with Submit Budget Revision.

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

Budget History

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

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# Appendix 6 for Slide 27

## Grant Management and Reporting Tool

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

The Expenditure Report tab is highlighted.

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# Appendix 7 for Slide 31

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Please provide additional remarks (if needed).

A button is displayed with Submit Expenditure Report.

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

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# Appendix 8 for Slide 33

Table showing the Program Cost Accounting (PCA) for every Comprehensive Support and Improvement (CSI) program.

CSI for County Office of Education (COE) Plan Development and Implementation Support has Resource Code 3182 and PCA 15439.

CSI for COE Plan Approval has Resource Code 3183 and PCA 15569.

CSI for Local Education Agencies has Resource Code 3182 and PCA 15438.

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# Appendix 9 for Slide 40

Table showing the life cycle of every Plan Approval grant.

After completing the Comprehensive Support and Improvement (CSI) Plan, Local Educational Agencies (LEAs) must complete the CSI required prompts in the Local Control Accountability Plan (LCAP.)

Then, County Offices of Education (COEs) review and approve CSI prompts in the LCAP.

Then, COEs provide a list of LEAs with approved CSI prompts to the California Department of Education (CDE.)

CDE provides the list of LEAs with approved CSI prompts to the State Board of Education for their approval.

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