



VIRGINIA BOARD OF EDUCATION

AGENDA ITEM

Agenda Item: H

Date: August 17, 2022

Title: First Review of Guidelines and Criteria for the Award and Distribution of Planning Grant Funds from the College Partnership Laboratory Fund

Presenter: The Honorable Aimee Guidera, Secretary of Education
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Purpose of Presentation:
Action required by state or federal law or regulation.

Executive Summary

College Partnership Laboratory Schools (or lab schools) are public schools that are designed and initiated by institutions of higher education (IHEs) and other similar entities. These schools leverage the resources, expertise, and capacity based at IHEs to provide inventive educational service delivery models to students. While there have been several lab school models implemented in Virginia since the 1950s, the formal statutory framework for lab schools was established through legislation in 2010. This framework sets expectations for governance and accountability, among other requirements, and requires that eligible IHEs seek approval with the Virginia Board of Education (Board) to open a lab school. There have been no lab schools opened in Virginia under this framework.

Governor Youngkin has committed to expanding the number of lab schools in Virginia to increase choice and opportunity, inspire innovation, and promote achievement in preK-12 public education. In line with this vision, during its 2022 Special Session, the General Assembly appropriated \$100M into the College Partnership Laboratory Fund (Fund) to support the development and implementation of new lab schools in the Commonwealth.

The \$100M appropriation is allotted for the following uses:

- \$5M for planning grants to support eligible entities in the design of new college lab schools and to assist in drafting and submitting a lab school application to the Board.
- \$20M for initial start-up grants for approved lab schools to make one-time purchases for expenses necessary to launch a lab school, such as staff recruitment, technology and material purchases, etc.
- \$75M (or the balance of the fund) for per-pupil operating grants to support ongoing expenses for the operation and maintenance of a lab school.

The budget language also requires the Board to issue guidelines for the award and distribution of grant money prior to distribution.

The *Guidelines and Criteria for the Award and Distribution of Planning Grant Funds* set the parameters for how the planning grants (\$5M) shall be administered, including the process for reviewing requests, how applications will be evaluated and prioritized, permissible expenditures, and accountability measures for the use of the grant funding. These guidelines and criteria will be supplemented by the *Guidelines and Criteria for the Award and Distribution of Lab School Start-up and Per-Pupil Funding Grants*, also being reviewed by the Board.

Action Requested:

Other. Specify below:

It is requested that the Board of Education waive First Review and approve the *Guidelines and Criteria for the Award and Distribution of Planning Grant Funds*.

Superintendent’s Recommendation

The Superintendent of Public Instruction recommends that the Board of Education waive First Review and approve the *Guidelines and Criteria for the Award and Distribution of Planning Grant Funds*.

Rationale for Action:

The Board is required to issue guidelines prior to the award and release of any grant moneys from the Fund. It is recommended that the Board waive first review and approve the *Guidelines and Criteria for the Award and Distribution of Planning Grant Funds* so that Virginia Department of Education (VDOE) may be as responsive as possible to the anticipated interest in this grant fund program and incoming applications. Additionally, by providing eligible entities access to planning grant funds sooner, they will have additional time to design their lab school application and prepare for execution of the launch of a new lab school.

Previous Review or Action:

No previous review or action.

Background Information and Statutory Authority:

Lab schools have fueled innovation and excellence in preK-12 education across the nation for over a century with early U.S. lab schools dating back to the late 1800s. Since lab schools are designed and initiated by IHEs and other similar entities, they are able to leverage the resources, expertise, and capacity based at such institutions to provide innovative educational service delivery models.

While there have been several lab school models implemented in Virginia since the 1950s, the formal statutory framework for lab schools was established through legislation in 2010. This framework sets expectations for governance and accountability, among other requirements, and requires that eligible institutions seek approval with the Board to open a lab school. Under the original statutory structure, only IHEs with Board-approved educator preparation programs (EPPs) could apply to open a lab school. Virginia lab schools and their governing bodies are subject to a similar legal structure as those of Virginia's public schools and their local school boards. As with public schools, lab schools are subject to the Standards of Learning, Standards of Quality, and Standards of Accreditation and other relevant federal and state law.

Following the legislation in 2010, the Board approved its Virginia College Partnership Laboratory School Application and Application Process in January 2011. The Board also established its College Partnership Laboratory School Committee as a standing committee to help support the review of lab school applications and make recommendations to the Board. The standing committee did receive one lab school application for review in 2013, but this application did not advance to the full Board for approval, so no lab schools have been established under the 2010 statutory framework.

During its 2022 Special Session, the General Assembly appropriated \$100M into the Fund to support the development and implementation of new lab schools in the Commonwealth. The appropriation language is found in [Item 137.C.44](#) and reads:

- a. Out of this appropriation, \$100,000,000 the first year from the general fund shall be deposited to the College Partnership Laboratory Schools Fund established pursuant to § 22.1-349.2, Code of Virginia.*
- b. The Board of Education is authorized to award up to \$5,000,000 from the College Partnership Laboratory Schools Fund for planning grants to entities pursuing the creation of new college partnership laboratory schools.*
- c. The Board of Education is authorized to award up to \$20,000,000 from the College Partnership Laboratory Schools Fund to approved college partnership laboratory schools to assist with initial startup costs.*

d. The Board of Education is authorized to distribute remaining amounts from the College Partnership Laboratory Schools Fund to support per-pupil costs for approved college partnership laboratory schools.

e. Prior to the disbursement of funds from the College Partnership Laboratory Schools Fund, the Board of Education shall establish guidelines for the distribution and award of these funds and submit such guidelines to the Chairs of the House Appropriations and Senate Finance and Appropriations Committees by December 1, 2022. Such guidelines shall consider and be consistent with the distribution of state funds for Standards of Quality, Categorical, Incentive and Lottery program per-pupil costs.

f. Notwithstanding the provisions of subsection A of § 22.1-349.1, Code of Virginia, for the purpose of this Item, a "college partnership laboratory school" means a public, nonsectarian, nonreligious school in the Commonwealth established by a baccalaureate public institution of higher education.

g. All funds that have not been obligated for approved college partnership laboratory schools as of June 30, 2024 shall revert to the general fund.

Item 137.C.44 also requires that the Board establish guidelines for the distribution and award of these funds. These guidelines and criteria must be transmitted to the General Assembly by December 1, 2022.

In addition to the \$100M appropriation, the General Assembly amended the statutory definition of a lab school to allow all public IHEs, certain private IHEs, and other higher education entities to submit a lab school application to the Board. These same entities are also eligible to apply for grant moneys from the Fund. There is no longer a requirement that IHEs have a Board-approved EPP to apply to open a lab school or access moneys from the Fund. The budget language that directed the statutory change is found in [Item 4-14](#) and reads:

19. That § 22.1-349.1 of the Code of Virginia is amended and reenacted as follows:

§ 22.1-349.1. Definitions; objectives.

A. As used in this chapter, unless the context requires a different meaning:

"At-risk student" means a student having a physical, emotional, intellectual, socioeconomic, or cultural risk factor, as defined in Board criteria, that research indicates may negatively influence educational success.

"College partnership laboratory school" means a public, nonsectarian, nonreligious school in the Commonwealth established by a public institution of higher education ~~or private institution of~~ public higher education ~~that operates a~~

teacher education program approved by the Board center, institute, or authority; center, institute, or authority; or an eligible institution as defined in § 23.1-628. Notwithstanding the provisions of § 22.1-349.5, a public institution of higher education; a public higher education center, institute, or authority; or an eligible institution as defined in § 23.1-628 may submit an application for formation of a college partnership laboratory school. ...

Pursuant to the requirement in Item 137.C.44 that the Board establish guidelines and criteria for the award and distribution of the moneys from the Fund, the attached document serves in fulfillment of this requirement for the first of the three types of grant moneys built into the Fund - the planning grant (\$5M).

As established in the guidelines and criteria, a planning grant is only meant to support the initial short-term costs associated with designing a new lab school. Types of eligible expenses may include additional staff, consultants, meeting costs, travel, and per diems. Expenditures for furniture or facilities, for example, are not permitted. The total amount for a start-up grant request is limited to \$200,000, with additional funding considered on a case-by-case basis and in accordance with available funds, and the applicant must provide certain financial information, details of deliverables, proof of sustainability, and the capacity to launch of a lab school in order to be considered for funding.

The guidelines and criteria establish parameters for how applications will be evaluated and prioritized. Among the key considerations for application reviewers are:

1. Targeted Student Population and Relevant Research: Intention to serve at-risk students and/or offer a new, innovative model grounded in evidence-based practices;
2. Clarity of Program Description, Goal, and Timeline: Indication of programmatic, operational, and infrastructural capacity to advance an application for approval to launch a Lab School and to launch a Lab School no later than the 2024-2025 school year, with preference for launch in the 2023-2024 school year;
3. Sustainability: Evidence of institutional commitment to the viability of the Lab School;
4. Collaboration: Collaboration with local school divisions, community-based organizations, and employers, as well as teachers and parents, in manner that promotes quality, innovation, and program sustainability;
5. Regional and Applicant Diversity: New awards will be made with preference to regional diversity and with preference to new applicants should an applicant have previously received a planning grant during the current fiscal year application period.

VDOE staff has proposed that the authority to administer initial start-up cost and per-pupil operating funding grants to VDOE. VDOE staff will convene a funding evaluation review committee to assist in the evaluation of planning grant applications. Awards will be determined and distributed consistent with the Board's approved guidelines and criteria. The procedural

process of delegating the authority to distribute grant funds to VDOE will allow for those grant funds to be awarded on a rolling basis, rather than on a month-to-month basis dependent upon the Board's ability to convene and approve grants.

Timetable for Further Review/Action:

If First Review is waived and the guidelines and criteria are approved, there will be no additional action required of the Board. Upon approval of the guidelines, planning grant funding request information will be posted on the VDOE website and shared with interested eligible entities, lab school applicants, local school divisions, and the general public. Additionally, the guidelines will be posted in Town Hall for a 30-day public comment period, pursuant to the Administrative Process Act.

Impact on Fiscal and Human Resources:

Grant funding from the College Partnership Laboratory Fund will be administered and awarded by VDOE staff, and therefore, will require significant staff time and capacity. Additional human resources will likely be required to support the review and facilitation of grant awards, depending on pace and volume.



COLLEGE PARTNERSHIP LABORATORY SCHOOLS FUND

GUIDELINES AND CRITERIA FOR THE AWARD AND
DISTRIBUTION OF PLANNING GRANT FUNDS

DRAFT

VIRGINIA BOARD OF EDUCATION

PURPOSE OF COLLEGE PARTNERSHIP LABORATORY SCHOOLS

College Partnership Laboratory Schools (Lab Schools) have fueled innovation and excellence in preK-12 education across the nation. Some of the nation's most prestigious schools were started as Lab Schools, and many of the most successful preK-12 institutions serving students with learning disabilities or particular talents and interests are Lab Schools. Virginia has identified Lab Schools as a critical part of ensuring a high-quality, innovative, and diverse educational ecosystem in the Commonwealth.

The planning grant program set out in the guidelines and application criteria is to (1) promote the thoughtful design of new Lab Schools to improve student achievement and outcomes; (2) create a pathway to launch Lab Schools by providing support to those eligible applicants well-positioned and motivated to advance Lab School applications and launch Lab Schools; (3) guarantee, to the greatest extent possible, that new Lab Schools are built on strong, sustainable programmatic and financial foundations; and (4) encourage regional diversification and increased access to new Lab Schools meeting the needs of students – especially those at-risk – across the Commonwealth.

BACKGROUND OF THE COLLEGE PARTNERSHIP LABORATORY SCHOOL FUND

The College Partnership Laboratory Schools Fund (Fund), set out in § [22.1-349.2](#) of the *Code of Virginia*, was first established in 2010 for the purpose of establishing and supporting College Partnership Laboratory Schools. During its 2022 Session, the General Assembly appropriated \$100,000,000 to the Fund.

The Virginia Board of Education (Board) is authorized to award up to \$5,000,000 from the Fund for planning grants to entities pursuing the creation of new Lab Schools. Additionally, the Board is authorized to award up to \$20,000,000 from the Fund for initial start-up cost funding grants (start-up) for entities approved by the Board and awarded a contract to create a new Lab School and to distribute the remaining balance (\$75,000,000 or more) in per-pupil operating funding grants (per-pupil) from the Fund for entities with approved Lab Schools.

Section [22.1-349.2](#) of the *Code of Virginia* and [Item 137.C.44](#) of the 2022 Appropriation Act direct the Board to establish criteria and guidelines for the distribution and award of moneys from the Fund prior to disbursement.

This document provides the required criteria and guidelines for the award and distribution of **planning grant** money from the Fund.

DEFINITIONS

PLANNING GRANT APPLICANT

A “planning grant applicant” or “applicant” is the primary entity pursuing the creation of a new College Partnership Laboratory School and must be a public institution of higher education, public higher education center, institute, or authority; or an eligible private institution of higher education as defined in § [23.1-628](#) related to the Tuition Assistance Grant Program. A “planning grant applicant” will be referred to as a “planning grant awardee” or “awardee” should its planning grant application be approved.

COLLEGE PARTNERSHIP LABORATORY SCHOOL

Pursuant to § [22.1-349.1\(A\)](#) of the *Code of Virginia*, as amended by Chapter 2 of the 2022 Acts of Assembly, Special Session I, a "College Partnership Laboratory School" means a public, nonsectarian, nonreligious school in the Commonwealth established by a public institution of higher education, public higher education center, institute, or authority; or an eligible private institution of higher education as defined in § [23.1-628](#) related to the Tuition Assistance Grant Program. Section [22.1-349.1\(B\)](#) states that Lab Schools are designed to “(i) stimulate the development of innovative education programs for preschool through grade 12 students; (ii) provide opportunities for innovative instruction and assessment; (iii) provide teachers with a vehicle for establishing schools with alternative innovative instruction and school scheduling, management, and structure; (iv) encourage the use of performance-based educational programs; (v) establish high standards for both teachers and administrators; (vi) encourage greater collaboration between education providers from preschool to the postsecondary level; and (vii) develop models for replication in other public schools.”

AT-RISK STUDENT

Pursuant to § [22.1-349.1\(A\)](#) of the *Code of Virginia*, an “at-risk student” means “a student having a physical, emotional, intellectual, socioeconomic, or cultural risk factor that research indicates may negatively influence educational success.” For the purpose of these guidelines and any planning grant awards, “at-risk students” include (1) students who have experienced learning loss as the result of the COVID-19 pandemic; (2) students served by low-performing schools that are designated as “accredited with conditions” or “accreditation denied” based on the Virginia Board of Education’s accreditation ratings; and (3) students attending schools identified under the Every Student Succeeds Act within three support categories: (i) Comprehensive Support and Improvement, (ii) Targeted Support and Improvement, or (iii) Additional Targeted Support Category.

REGIONAL DIVERSITY

For the purpose of these guidelines, regional diversity reflects representation from each of the Virginia Department of Education’s (Department) eight Superintendent [regions](#).

REQUESTING PLANNING GRANT FUND MONEYS

PLANNING GRANT APPLICATION REQUIRED COMPONENTS

A planning grant application must include the following components:

- General information about the applicant and its partners;
- General information about the proposed Lab School, including school governance and structure; facilities; mission and pedagogy; methods of assessment; and prospective student population;
- A description of the school’s proposed instructional model, including how it will improve student academic proficiency, mastery, college- and career-readiness, and long-term outcome goals;
- Assurances that the applicant will abide by applicable federal and state laws and regulations, meet deliverables according to the timeline set by the Board (as provided below), and other requirements prescribed by the Department;
- The total planning grant request amount not exceeding \$200,000 per planning grant application, with additional funding considered on a case-by-case basis and in accordance with available funds;
- A financial plan, including a line-item budget indicating how the requested planning grant funds will be used;
- A timeline for use of planning grant funds during the grant term with corresponding benchmarks and deliverables;
- A description of a plan for involvement of teachers, parents, community, organizations, employers, etc., in the planning, development, and implementation of the program; and
- A description of how the Lab School will secure and maintain community-based partnerships (i.e. businesses, organizations, local school boards and divisions, etc.) to ensure programmatic, financial, and operational success and sustainability of the Lab School.

PERMISSIBLE EXPENDITURES FOR PLANNING GRANTS

The line-item budget of a planning grant application shall only include allowable expenses. Common allowable expenditures for planning grants include additional staff, consultants, meeting costs, travel, per diems. Typically impermissible or unallowable expenditures include furniture, capital assets for Lab Schools. Line items of planning grant applications are subject to review and approval in any award.

TIMELINE FOR PLANNING GRANT ACTIVITY

Planning grant awards may be for a grant term not to exceed 12 months, with staggered distribution of moneys during the term to ensure that awardees are progressing toward the submission to the Board of an application for approval to launch a Lab School. Planning grant applicants must provide assurance that they will subscribe to the following timetable:

TIMELINE	BENCHMARK AND DELIVERABLES
On or before the end of the first quarter of the grant term	Awardee must present a proposed list of milestones, measures of success, and deliverables.

On or before the end of the second quarter of the grant term	Awardee must submit a progress report in order to be eligible for drawing down reimbursements on the second installment of the award.
On or before the end of the third quarter of the grant term	Awardee must present progress on milestones and deliverables, including submission to the Board of an application for approval to launch a Lab School.
On or before the end of the grant term	Awardee is expected to have attained approval by the Board to launch a Lab School.

Department staff may adjust the above timeline, benchmarks, and deliverables.

SUBMITTING PLANNING GRANT APPLICATIONS

The planning grant application must be submitted on the form provided by the Department.

Planning grant applications may be submitted by email to labschools@doe.virginia.gov.

EVALUATING PLANNING GRANT SUBMISSIONS

Planning grant applications will be accepted and reviewed on a rolling basis. The Department will prioritize grant applications planning to open a Lab School by the school year 2023-2024. Planning grant applications will only be considered if they are complete and include all of the required components. A funding evaluation review committee convened by the Department will evaluate planning grant applications for completeness, and according to a weighted rubric designed by the Department that is aligned to the application components and emphasizes the following factors:

1. Targeted Student Population and Relevant Research: Intention to serve at-risk students and/or offer a new, innovative model grounded in evidence-based practices to improve student academic proficiency, mastery, college- and career-readiness, and long-term outcomes;
2. Clarity of Program Description, Goal, and Timeline: Indication of programmatic, operational, and infrastructural capacity to advance an application for approval to launch a Lab School and to launch a Lab School no later than the 2024-2025 school year, with preference for launch in the 2023-2024 school year;
3. Sustainability: Evidence of institutional commitment to the viability of the Lab School;
4. Collaboration: Collaboration with local school divisions, community-based organizations, and employers, as well as teachers and parents, in manner that promotes quality, innovation, and program results and sustainability;
5. Regional and Applicant Diversity: New awards will be made with preference to regional diversity and with preference to new applicants should an applicant have previously received a planning grant during the current fiscal year application period.

Funds will only be awarded to applicants whose applications earn a score deemed satisfactory by the funding evaluation review committee using the planning grant application’s weighted rubric. Applicants are not guaranteed the requested award amount and awards may be proportionally adjusted according to application’s score and to reflect only those expenditures that are designated as permissible.

ADMINISTRATION OF PLANNING GRANTS

The Board hereby delegates authority to the Department, which includes the funding evaluation review committee convened by the Department, for awarding and administering moneys from the Fund for planning grants, consistent with the above criteria and guidelines.

The Fund will be administered according to state accounting practices and the Code of Virginia.

DETERMINING PLANNING GRANT AMOUNTS AND DISTRIBUTIONS

- Awards: The Department will only award funds to applicants who have completed all application components and have earned a satisfactory score according to its weighted rubric.
- Expenditures: The Department will only award funds for allowable expenditures and in an amount not to exceed \$200,000 per planning grant applicant, with additional funding considered on a case-by-case basis and in accordance with available funds.
- Regional Diversity: The Department will ensure distributions from the Fund reflect regional diversity, and that planning grant moneys may be retained in the Fund to ensure each of the Superintendent's eight regions will be entitled to at least one planning grant.
- Fund Availability: Moneys will be distributed in a manner that promotes regional and applicant diversity, according to the weighted rubric scores and priority categories. If there are inadequate funds to distribute an approved award amount, a waiting list will be maintained.

RIGHT TO CONDUCT FINANCIAL REVIEW

The Department reserves the right to request a financial review to assess planning grant progress or expenditures during the 12-month term to ensure the awardee is meeting, or is capable of meeting, the timeline for the grant activity.

The Department may withhold any unspent planning grant moneys, or alter disbursements from the Fund to the awardee based on approved expenses, if (1) the awardee does not meet a benchmark designated on the planning grant timeline; or (2) a financial review reveals grant funds have been misused. The Department must inform the awardee of a change in grant status as soon as practicable.

Awardees will be required to submit to a review of planning grant expenditures, as well as provide findings from planning research and any additional information prescribed by the Department.

ADDITIONAL PROTOCOLS FOR FUND ADMINISTRATION

- The Department will act on a planning grant application within 30 business days of receipt.
- Funds will be disbursed to awardees within 30 business days of Department approval.

- Moneys will be distributed to awardees by the Department from the Fund for allowable expenses according to the approved timeline of their planning grant. In order to be eligible for distribution of moneys, all planning grant application deadlines and requirements must have been met.
- Award balances not spent by June 30 of the state fiscal year in which the funds were received may be carried over into the next state fiscal year must be used for the same program purpose.
- Awardees must return any unobligated planning grant funds within 12 months of receipt of the moneys.
- Awardees may be eligible to apply for additional distributions from the Fund in subsequent years for start-up costs and per-pupil operating funding under separate guidelines, after submission and subsequent approval of an application to launch a Lab School by the Board.

DEPARTMENT CONTACT FOR PLANNING GRANTS

Questions about the planning grant process should be directed to labschools@doe.virginia.gov.



COLLEGE PARTNERSHIP LABORATORY SCHOOLS FUND

GUIDELINES AND CRITERIA FOR THE AWARD AND
DISTRIBUTION OF PLANNING GRANT FUNDS

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The planning grant program set out in the guidelines and application criteria is to (1) promote the thoughtful design of new Lab Schools to improve student achievement and outcomes; (2) create a pathway to launch Lab Schools by providing support to those eligible applicants well-positioned and motivated to advance Lab School applications and launch Lab Schools; (3) guarantee, to the greatest extent possible, that new Lab Schools are built on strong, sustainable programmatic and financial foundations; and (4) encourage regional diversification and increased access to new Lab Schools meeting the needs of students – especially those at-risk – across the Commonwealth.

BACKGROUND OF THE COLLEGE PARTNERSHIP LABORATORY SCHOOL FUND

The College Partnership Laboratory Schools Fund (Fund), set out in § [22.1-349.2](#) of the *Code of Virginia*, was first established in 2010 for the purpose of establishing and supporting College Partnership Laboratory Schools. During its 2022 Session, the General Assembly appropriated \$100,000,000 to the Fund.

The Virginia Board of Education (Board) is authorized to award up to \$5,000,000 from the Fund for planning grants to entities pursuing the creation of new Lab Schools. Additionally, the Board is authorized to award up to \$20,000,000 from the Fund for initial start-up cost funding grants (start-up) for entities approved by the Board and awarded a contract to create a new Lab School and to distribute the remaining balance (\$75,000,000 or more) in per-pupil operating funding grants (per-pupil) from the Fund for entities with approved Lab Schools.

Section [22.1-349.2](#) of the *Code of Virginia* and [Item 137.C.44](#) of the 2022 Appropriation Act direct the Board to establish criteria and guidelines for the distribution and award of moneys from the Fund prior to disbursement.

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REQUESTING PLANNING GRANT FUND MONEYS

PLANNING GRANT APPLICATION REQUIRED COMPONENTS

A planning grant application must include the following components:

- General information about the applicant and its partners;
- General information about the proposed Lab School, including school governance and structure; facilities; mission and pedagogy; methods of assessment; and prospective student population;
- A description of the school’s proposed instructional model, including how it will improve student academic proficiency, mastery, college- and career-readiness, and long-term outcome goals;
- Assurances that the applicant will abide by applicable federal and state laws and regulations, meet deliverables according to the timeline set by the Board (as provided below), and other requirements prescribed by the Department;
- The total planning grant request amount not exceeding \$200,000 per planning grant application, with additional funding considered on a case-by-case basis and in accordance with available funds;
- A financial plan, including a line-item budget indicating how the requested planning grant funds will be used;
- A timeline for use of planning grant funds during the grant term with corresponding benchmarks and deliverables;
- A description of a plan for involvement of teachers, parents, community, organizations, employers, etc., in the planning, development, and implementation of the program; and
- A description of how the Lab School will secure and maintain community-based partnerships (i.e. businesses, organizations, local school boards and divisions, etc.) to ensure programmatic, financial, and operational success and sustainability of the Lab School.

PERMISSIBLE EXPENDITURES FOR PLANNING GRANTS

The line-item budget of a planning grant application shall only include allowable expenses. Common allowable expenditures for planning grants include additional staff, consultants, meeting costs, travel, per diems. Typically impermissible or unallowable expenditures include furniture, capital assets for Lab Schools. Line items of planning grant applications are subject to review and approval in any award.

TIMELINE FOR PLANNING GRANT ACTIVITY

Planning grant awards may be for a grant term not to exceed 12 months, with staggered distribution of moneys during the term to ensure that awardees are progressing toward the submission to the Board of an application for approval to launch a Lab School. Planning grant applicants must provide assurance that they will subscribe to the following timetable:

TIMELINE	BENCHMARK AND DELIVERABLES
On or before the end of the first quarter of the grant term	Awardee must present a proposed list of milestones, measures of success, and deliverables.

On or before the end of the second quarter of the grant term	Awardee must submit a progress report in order to be eligible for drawing down reimbursements on the second installment of the award.
On or before the end of the third quarter of the grant term	Awardee must present progress on milestones and deliverables, including submission to the Board of an application for approval to launch a Lab School.
On or before the end of the grant term	Awardee is expected to have attained approval by the Board to launch a Lab School.

Department staff may adjust the above timeline, benchmarks, and deliverables.

SUBMITTING PLANNING GRANT APPLICATIONS

The planning grant application must be submitted on the form provided by the Department.

Planning grant applications may be submitted by email to labschools@doe.virginia.gov.

EVALUATING PLANNING GRANT SUBMISSIONS

Planning grant applications will be accepted and reviewed on a rolling basis. The Department will prioritize grant applications planning to open a Lab School by the school year 2023-2024. Planning grant applications will only be considered if they are complete and include all of the required components. A funding evaluation review committee convened by the Department will evaluate planning grant applications for completeness, and according to a weighted rubric designed by the Department that is aligned to the application components and emphasizes the following factors:

1. Targeted Student Population and Relevant Research: Intention to serve at-risk students and/or offer a new, innovative model grounded in evidence-based practices to improve student academic proficiency, mastery, college- and career-readiness, and long-term outcomes;
2. Clarity of Program Description, Goal, and Timeline: Indication of programmatic, operational, and infrastructural capacity to advance an application for approval to launch a Lab School and to launch a Lab School no later than the 2024-2025 school year, with preference for launch in the 2023-2024 school year;
3. Sustainability: Evidence of institutional commitment to the viability of the Lab School;
4. Collaboration: Collaboration with local school divisions, community-based organizations, and employers, as well as teachers and parents, in manner that promotes quality, innovation, and program results and sustainability;
5. Regional and Applicant Diversity: New awards will be made with preference to regional diversity and with preference to new applicants should an applicant have previously received a planning grant during the current fiscal year application period.

Funds will only be awarded to applicants whose applications earn a score deemed satisfactory by the funding evaluation review committee using the planning grant application’s weighted rubric. Applicants are not guaranteed the requested award amount and awards may be proportionally adjusted according to application’s score and to reflect only those expenditures that are designated as permissible.

ADMINISTRATION OF PLANNING GRANTS

The Board hereby delegates authority to the Department, which includes the funding evaluation review committee convened by the Department, for awarding and administering moneys from the Fund for planning grants, consistent with the above criteria and guidelines.

The Fund will be administered according to state accounting practices and the Code of Virginia.

DETERMINING PLANNING GRANT AMOUNTS AND DISTRIBUTIONS

- Awards: The Department will only award funds to applicants who have completed all application components and have earned a satisfactory score according to its weighted rubric.
- Expenditures: The Department will only award funds for allowable expenditures and in an amount not to exceed \$200,000 per planning grant applicant, with additional funding considered on a case-by-case basis and in accordance with available funds.
- Regional Diversity: The Department will ensure distributions from the Fund reflect regional diversity, and that planning grant moneys may be retained in the Fund to ensure each of the Superintendent's eight regions will be entitled to at least one planning grant.
- Fund Availability: Moneys will be distributed in a manner that promotes regional and applicant diversity, according to the weighted rubric scores and priority categories. If there are inadequate funds to distribute an approved award amount, a waiting list will be maintained.

RIGHT TO CONDUCT FINANCIAL REVIEW

The Department reserves the right to request a financial review to assess planning grant progress or expenditures during the 12-month term to ensure the awardee is meeting, or is capable of meeting, the timeline for the grant activity.

The Department may withhold any unspent planning grant moneys, or alter disbursements from the Fund to the awardee based on approved expenses, if (1) the awardee does not meet a benchmark designated on the planning grant timeline; or (2) a financial review reveals grant funds have been misused. The Department must inform the awardee of a change in grant status as soon as practicable.

Awardees will be required to submit to a review of planning grant expenditures, as well as provide findings from planning research and any additional information prescribed by the Department.

ADDITIONAL PROTOCOLS FOR FUND ADMINISTRATION

- The Department will act on a planning grant application within 30 business days of receipt.
- Funds will be disbursed to awardees within 30 business days of Department approval.

- Moneys will be distributed to awardees by the Department from the Fund for allowable expenses according to the approved timeline of their planning grant. In order to be eligible for distribution of moneys, all planning grant application deadlines and requirements must have been met.
- Award balances not spent by June 30 of the state fiscal year in which the funds were received may be carried over into the next state fiscal year must be used for the same program purpose.
- Awardees must return any unobligated planning grant funds within 12 months of receipt of the moneys.
- Awardees may be eligible to apply for additional distributions from the Fund in subsequent years for start-up costs and per-pupil operating funding under separate guidelines, after submission and subsequent approval of an application to launch a Lab School by the Board.

DEPARTMENT CONTACT FOR PLANNING GRANTS

Questions about the planning grant process should be directed to labschools@doe.virginia.gov.