



District of Columbia
Office of the State Superintendent of Education

Scholarships for Opportunity and Results (SOAR) Act Formula Consolidated Application Guide

*Guidance for Completing FY27 SOAR Formula
Consolidated Applications (Academic Quality and
Early Childhood Grant Programs)*

September 2026

Contents

Using the FY27 SOAR Formula Consolidated Application Guide	1
FY27 Application at a Glance: SOAR Formula Consolidated.....	2
Checklists: Academic Quality and Early Childhood Application Sections.....	5
Needs Assessment.....	5
Project Details	5
Project Activities.....	6
GEPA Statement	7
Budget.....	8
Budget: Salaries and Benefits.....	8
Budget: Professional Services	8
Budget: Equipment (Items with a per-unit cost of \$10,000 or more)	9
Budget: Supplies and Materials.....	9
Budget: Other Objects.....	10

Using the FY27 SOAR Formula Consolidated Application Guide

This guide supports public charter local education agencies (LEAs) in completing their fiscal year 2027 (FY27) applications for the Academic Quality grant (and Early Childhood grant, if applicable). These applications are combined into the SOAR Formula Consolidated application in the Enterprise Grants Management System ([EGMS](#)). This guide provides overviews of each section of the application, including checklists of what needs to be completed. LEAs are encouraged to review these checklists prior to submitting the application in EGMS.

UPDATES! Two changes were made to the FY27 Academic Quality and Early Childhood applications. These pertain to text box character limits for the project objective (reduced from 5,000 to 1,000 characters) and theory of action (reduced from 5,000 to 2,000 characters). The purpose of this change was to align character limits with the maximum expected response length for both questions.

Additional resources to assist you with completing your LEA's application are:

Resource	Description
SOAR Formula Allowable Uses	One-page document with descriptions and examples of allowable expenditures under the SOAR Formula grants.
FY27 SOAR Formula Allocations and Program Contacts	LEA allocation(s) for FY27 Academic Quality and Early Childhood grants and SOAR program contacts.
Pre-Application Webinar – Thursday, Oct. 8 at 11 a.m. (Register here .)	Optional live webinar providing an overview of grant purposes, application content and process, and allowable expenditures. The webinar will be recorded and posted on OSSE's SOAR Formula webpage for future reference.

If you have any questions about this guide or the SOAR Formula grant programs, please contact your LEA's OSSE [SOAR grant specialist](#).

FY27 Application at a Glance: SOAR Formula Consolidated

The following tables provide an overview of the three sections within the SOAR Formula Consolidated application in EGMS; the tabs each section contains; a high-level description of the content on each tab; and whether completion of a particular tab is required, optional, or for reference only.

Applicant:

Application Cycle: 2026-2027 SOAR Formula Consolidated - 00-SOAR Formula Consolidated Original Application

2026-2027 7/1/2026 - 9/30/2027

Application Sections

SOAR Formula Consolidated

[Printer-Friendly](#)

[Return to the Dashboard](#)

[Click to Return to Menu List / Sign Out](#)

OVERVIEW

CONTACT INFORMATION

SUPPORTING DOCUMENTATION

ALLOCATIONS

ASSURANCES

SUBMIT

APPLICATION HISTORY

APPLICATION PRINT

Tab	Description
Application Section: SOAR Formula Consolidated	
Overview <i>(Reference Only)</i>	Provides key details and requirements of the SOAR Formula grants, including: - Purpose of Funds; - Award Period; - Permissible Use of Funds; - Requirements of Funding; and - Terms and Conditions.
Contact Information <i>(Required)</i>	You should list your LEA's main points of contact for the SOAR Formula grant program(s).
Supporting Documentation <i>(Optional)</i>	You may use this tab to attach supplemental details or comply with requests for information from OSSE at any point during the application process and award period.
Allocations <i>(Reference Only)</i>	Provides your LEA's FY27 SOAR Formula allocation amount(s).
Assurances <i>(Required)</i>	Your LEA's authorized representative must read and acknowledge assurances.
Submit <i>(Required)</i>	You must run a "consistency check" on this tab, which scans the application for completeness of all required sections. After the consistency check is successfully completed, your LEA's authorized representative must submit the completed application to OSSE by clicking the "Submit to OSSE" button on this tab. For FY27, the application deadline is 3 p.m. on Thursday, Nov. 5, 2026 .
Application History <i>(Reference Only)</i>	Provides details on the status of the application.
Application Print <i>(Optional)</i>	Provides the option to print your LEA's application.

Applicant:

Application Cycle: 2026-2027 SOAR Formula Consolidated - 00-SOAR Formula Consolidated Original Application

2026-2027 7/1/2026 - 9/30/2027

Application Sections

Academic Quality

[Printer-Friendly](#)

[Return to the Dashboard](#)

[Click to Return to Menu List / Sign Out](#)

NEEDS ASSESSMENT

PROJECT DETAILS

PROJECT ACTIVITIES

GEPA STATEMENT

BUDGET

BUDGET AMENDMENTS

Tab	Description
Application Section: Academic Quality <i>SOAR Academy Quality funding is available to support projects designed to have a direct impact on student achievement, either school-wide or for specific subgroups of students. LEAs that receive a FY27 Academic Quality allocation should complete the first five tabs in this application section.</i>	
Needs Assessment <i>(Required)</i>	This tab includes the following components: - Quantitative and qualitative data sources checklists; and - Needs assessment narrative.
Project Details <i>(Required)</i>	This tab includes the following components: - Areas of focus checklist; - Key strategies checklist; - Box to indicate number of students impacted by the grant project; - Project objective in SMART format (Specific, Measurable, Attainable, Relevant, and Time-bound); - Project description; and - Theory of action.
Project Activities <i>(Required)</i>	This tab includes the following component: Chart for indicating at least three specific activities for each reporting period.
GEPA Statement <i>(Required)</i>	This tab includes the following components: - Description of mission, policies, or commitments that ensure equitable access to, and equitable participation in, the proposed project; - Description of barriers that could impede equitable access or participation; - Description of steps that will be taken to address barriers; and - Description of timeline for addressing identified barriers.
Budget <i>(Required)</i>	Your LEA must include proposed itemized expenditures under the following categories, as applicable: - Salaries and Benefits; - Professional Services (i.e., contracted work); - Equipment; - Supplies and Materials; and - Other Objects.
Budget Amendments <i>(Do not complete with original application)</i>	This tab should NOT be completed with the original application. Your LEA will use this tab to describe and provide a rationale for specific budget changes when completing a budget amendment.

Applicant:		Application Sections Early Childhood	
Application Cycle:	2026-2027 SOAR Formula Consolidated - 00-SOAR Formula Consolidated Original Application	2026-2027 7/1/2026 - 9/30/2027	Printer-Friendly Return to the Dashboard Click to Return to Menu List / Sign Out
NEEDS ASSESSMENT PROJECT DETAILS PROJECT ACTIVITIES GEPA STATEMENT BUDGET BUDGET AMENDMENTS			

Tab	Description
Application Section: Early Childhood <i>SOAR Early Childhood funding is available for supplementary activities that support school readiness, including the development of literacy and mathematics skills for early childhood students (i.e., 3- and 4-year-olds). LEAs that receive a FY27 Early Childhood allocation should complete the first five tabs in this application section.</i>	
Needs Assessment <i>(Required)</i>	This tab includes the following components: - Quantitative and qualitative data sources checklist; and - Needs assessment narrative.
Project Details <i>(Required)</i>	This tab includes the following components: - Areas of focus checklist; - Key strategies checklist; - Box to indicate number of students impacted by the grant project; - Project objective in SMART format (Specific, Measurable, Attainable, Relevant, and Time-bound); - Project description; and - Theory of action.
Project Activities <i>(Required)</i>	This tab includes the following component: Chart for indicating at least three specific activities for each reporting period.
GEPA Statement <i>(Required)</i>	This tab includes the following components: - Description of mission, policies, or commitments that ensure equitable access to, and equitable participation in, the proposed project; - Description of barriers that could impede equitable access or participation; - Description of steps that will be taken to address barriers; and - Description of timeline for addressing identified barriers.
Budget <i>(Required)</i>	Your LEA must include proposed itemized expenditures under the following categories, as applicable: - Salaries and Benefits; - Professional Services (i.e., contracted work); - Equipment; - Supplies and Materials; and - Other Objects.
Budget Amendments <i>(Do not complete with original application)</i>	This tab should NOT be completed with the original application. Your LEA will use this tab to describe and provide a rationale for specific budget changes when completing a budget amendment.

Checklists: Academic Quality and Early Childhood Application Sections

These checklists will support your LEA in completing the SOAR Academic Quality and Early Childhood application sections. They detail each element that OSSE will look for when reviewing your LEA's application. While drafting responses, use these checklists to ensure all items on the checklist are addressed and you have included all required information in your narrative. This will help your LEA formulate a meaningful grant project that impacts student and school community outcomes and minimize the likelihood that the application will be returned for changes.

Needs Assessment

In the Needs Assessment tab, be sure that you:

- ☐ Use the data sources you select in the provided list to clearly demonstrate a need at your LEA, either for all students or for specific subgroups of students.
- ☐ Include at least one corresponding data point in the needs assessment narrative for each data source you selected.
 - *For example:* If the data source you select is "Next Generation Assessments," a specific data point could be, "Only 20 percent of fifth-grade students scored a 4 or 5 on DC CAPE for math in the 2025-26 school year."
- ☐ Aim to include both quantitative and qualitative data sources when substantiating the need for the proposed project. **You must include at least one data source related to academic achievement or growth.**
- ☐ Provide current data points. Your LEA may continue the same project from a prior year's SOAR grant, but **the data provided must be the most recently available** (e.g., 2025-26 DC CAPE results, spring 2026 family surveys, fall 2026 benchmark testing).

Project Details

In the Project Details tab, be sure that you:

- ☐ Identify at least one area of focus, which aligns with the needs assessment and project description.
- ☐ Identify at least one key strategy, which aligns with the needs assessment and project description.
- ☐ Indicate the number of students that will be impacted by the project.

- ☐ Provide the project objective(s) in SMART format (Specific, Measurable, Attainable, Relevant, and Time-bound).
 - *For example:* For the DC CAPE Next assessments administered in spring 2027, X percent of students in grades 6 through 8 will achieve a level 3 or 4 in math.
- ☐ Ensure clear alignment between 1) the identified need(s) and the project objective(s), and 2) the project objective(s) and the project description.
- ☐ Describe the proposed project clearly, including how it will meet the need(s) identified in the needs assessment section and have a direct impact on student achievement, either school-wide or for specific subgroups of students (and, for the Early Childhood grant, include how the project will facilitate supplementary activities that support school readiness, including the development of literacy and mathematics skills).
- ☐ Provide the theory of action in the required if-then-because format: “IF [we do X activity], THEN [we will see Y result], BECAUSE [research/evidence shows Z].”
 - *For example:* IF families have more opportunities for engagement, THEN student retention will increase, BECAUSE research shows that “family engagement in education is directly related to a range of benefits for students, including improved school readiness, higher academic achievement, better social skills and behavior, and increased likelihood of high school graduation” (Harvard Family Research Project, 2021).
 - The statement should clearly communicate how and why the project will be successful.
- ☐ Cite evidence from a credible, recent (less than 10 years old) academic source OR provide specific evidence of success at your LEA.

Project Activities

In the Project Activities tab, be sure that you:

- ☐ Provide at least **three specific activities** for each of the **two reporting periods** (a total of six activities minimum for the entire award period).

Reporting Period 1	July 1, 2026 - Jan. 31, 2027
Reporting Period 2	Feb. 1, 2027 - Sept. 30, 2027

- ☐ Align the activities you include on this tab with all major activities that are described in the project description section of the application.
- ☐ Include a target completion date for each activity, using the MM/YYYY format, that falls within the applicable reporting period.
- ☐ Include a description of the evidence of completion for each activity, which your LEA will retain in its files to demonstrate that the activity has been completed (e.g., professional development sign-in sheets, coaching logs, student data trackers, observation notes).

- Note: Your LEA will be required to submit evidence for each activity if selected for OSSE monitoring of FY27 grants.
- Evidence may include multiple items for one activity to sufficiently demonstrate completion (e.g., dated professional development sign-in sheet, agenda, training slides).

GEPA Statement

In the General Education Provisions Act (GEPA) Statement tab, be sure to include descriptions of:

- ☐ How your LEA's existing mission, policies, or commitments ensure equitable access to, and equitable participation in, the proposed SOAR-funded project or activity.
 - *For example:* Regarding the afterschool reading tutoring program that is being supported by SOAR funds, our LEA's communications policy stipulates that we disseminate all major announcements via email, text, and hard copy. This helps ensure that all parents and caregivers are fully aware of the opportunities available for their children and increases enrollment rates for students most in need of supports such as reading tutoring.
- ☐ At least one potential barrier that could impede equitable access and participation of students, educators, or other beneficiaries in the proposed SOAR-funded project or activity.
 - *For example:* For afterschool activities such as the tutoring program, we have identified that transportation is a barrier for many of our students experiencing homelessness.
- ☐ The steps that your LEA will take to address identified barriers to equitable access and participation in the proposed SOAR-funded project or activity.
 - *For example:* In order to address this transportation barrier, we plan to partner with a shuttle company to provide rides to impacted students at 6 p.m. when the tutoring program ends.
- ☐ The timeline and targeted milestones for addressing the identified barriers in the proposed SOAR-funded project or activity.
 - *For example:* As we submit this grant application in November 2026, we have finished receiving quotes from multiple transportation companies and will make a selection by Dec. 15, 2026. This will allow us to sign a contract in early January and begin service for students on Jan. 15, 2027, the first day of the tutoring program. We plan to survey parents and caregivers in February to see how the service is working for them and obtain any suggestions for improvement.

Budget

As overall guidance for the SOAR grant budget, be sure that you:

- ☐ Design the budget to cover costs incurred during the award period (July 1, 2026 - Sept. 30, 2027), ensuring goods and services can reasonably be received within this time frame.
- ☐ Align the budgeted costs with the project description.
- ☐ Provide a complete justification in the cost basis field for each budgeted item.

The subsections below provide the specific information and details you need to include in each line and column of your SOAR grant budget.

Budget: Salaries and Benefits

On the Salaries and Benefits tab, each budget line item must have:

- ☐ *Program Category*: Select the program category that best fits the purpose of the expenditure. Please refer to the [Expenditure Categorization Guide](#) for more guidance.
- ☐ *Position Title*: Enter the position title of the employee working on the grant project. If multiple individuals with the same title will be included in the budget, you may include them on the same line (e.g., “2 Special Education Teachers”).
 - Note: The “supplement not supplant” requirement does not apply to the SOAR Academic Quality and Early Childhood grants, so it is acceptable to budget for salaries of teachers and other staff that would normally be supported by local funding.
- ☐ *Brief Position Description*: Provide a brief description (no more than one to two sentences) of the role of this employee. The description should demonstrate how the activities conducted by the individual are **necessary** to meet the purpose or objectives of the grant project.
- ☐ *Cost Basis*: Provide a justification for the amount budgeted for this employee. This should include 1) **annual salary** (and benefits, if applicable), 2) whether it is a **full-time or part-time** position, 3) **percentage of salary** that will be charged to the grant, and 4) **time period**.
 - Example of an acceptable cost basis structure you can use:
 - Annual salary and benefits for this [full-time]/[part-time] position is [\$XX]. [X%] of the total annual salary and benefits will be charged to the grant during the FY27 grant period, from [month, year] to [month, year].
- ☐ *Amount Budgeted*: Enter the total amount budgeted for the employee(s).

Budget: Professional Services

On the Professional Services tab, each budget line item must have:

- ☐ *Program Category*: Select the program category that best fits the purpose of the expenditure. Please refer to the [Expenditure Categorization Guide](#) for more guidance.

- ☐ *Item(s) to be Purchased:* Describe the specific goods or services that will be purchased with grant funds.
- ☐ *Purpose of Expenditure:* Provide a brief description (no more than one to two sentences) of the purpose of this expenditure for the grant program. The description must explain why the expenditure is **necessary** to meet the purpose or objectives of the grant project.
- ☐ *Cost Basis:* Provide a justification for the amount budgeted for this expenditure. This should include the quantity (i.e., number of units) and estimated cost per unit. For services, the cost basis should include the time period of the contract. The cost basis should demonstrate how the amount budgeted is **reasonable for what is being purchased** (e.g., a two-hour professional learning workshop that costs \$50,000 would not be reasonable).
 - For example, for a series of monthly in-school literacy trainings budgeted at \$10,000, an acceptable cost basis format could be “10 two-hour workshops at \$1,000 each; contract with vendor covers Sept. 1, 2026 - June 30, 2027.”
- ☐ *Amount Budgeted:* Enter the total amount budgeted for the item(s).

Budget: Equipment (Items with a per-unit cost of \$10,000 or more)

On the Equipment tab, each budget line item must have:

- ☐ *Program Category:* Select the program category that best fits the purpose of the expenditure. Please refer to the [Expenditure Categorization Guide](#) for more guidance.
- ☐ *Item(s) to be Purchased:* Describe the specific goods or services that will be purchased with grant funds.
- ☐ *Purpose of Expenditure:* Provide a brief description (no more than one to two sentences) of the purpose of this expenditure in the grant program. The description must explain why the expenditure is **necessary** to meet the purpose or objectives of the grant project.
- ☐ *Cost Basis:* Provide a justification for the amount budgeted for this expenditure. This should include the quantity (i.e., number of units) and estimated cost per unit. For services, the cost basis should include the time period of the contract. The cost basis should demonstrate how the amount budgeted is **reasonable for what is being purchased** (e.g., a classroom copy machine that costs \$30,000 would not be reasonable).
 - For example, for demonstration fume hoods for the school’s two chemistry labs budgeted at \$20,400, an acceptable cost basis format could be “two fume hoods estimated at \$10,200 each.”
- ☐ *Amount Budgeted:* Enter the total amount budgeted for the item(s).

Budget: Supplies and Materials

On the Supplies and Materials tab, each budget line item must have:

- ☐ *Program Category:* Select the program category that best fits the purpose of the expenditure. Please refer to the [Expenditure Categorization Guide](#) for more guidance.
- ☐ *Item(s) to be Purchased:* Describe the specific goods or services that will be purchased with grant funds.

- ☐ *Purpose of Expenditure:* Provide a brief description (no more than one to two sentences) of the purpose of this expenditure in the grant program. The description must explain why the expenditure is **necessary** to meet the purpose or objectives of the grant project.
- ☐ *Cost Basis:* Provide a justification for the amount budgeted for this expenditure. This should include the quantity (i.e., number of units) and estimated cost per unit. For services, the cost basis should include the time period of the contract. The cost basis should demonstrate how the amount budgeted is **reasonable for what is being purchased** (e.g., a book that costs \$1,000 would not be reasonable).
 - For example, for student laptops budgeted at \$15,000, an acceptable cost basis format could be “30 Chromebooks estimated at \$500 each.”
- ☐ *Amount Budgeted:* Enter the total amount budgeted for the item(s).

Budget: Other Objects

On the Other Objects tab, each budget line item must have:

- ☐ *Program Category:* Select the program category that best fits the purpose of the expenditure. Please refer to the [Expenditure Categorization Guide](#) for more guidance.
- ☐ *Item(s) to be Purchased:* Describe the specific goods or services that will be purchased with grant funds. **The “Other Objects” budget category should be used sparingly and only for items that don’t fall under other budget categories.** Examples include conference registration fees, travel expenditures (plane fares, Uber, taxi, etc.), one-off venue rental for trainings or events related to the grant project, and teacher stipends.
- ☐ *Purpose of Expenditure:* Provide a brief description (no more than one to two sentences) of the purpose of this expenditure in the grant program. The description must explain why the expenditure is **necessary** to meet the purpose or objectives of the grant project.
- ☐ *Cost Basis:* Provide a justification for the amount budgeted for this expenditure. This should include the quantity (i.e., number of units) and estimated cost per unit. For services, the cost basis should include the time period of the contract. The cost basis should demonstrate how the amount budgeted is **reasonable for what is being purchased** (e.g., an economy-class airline ticket that costs \$10,000 would not be reasonable).
 - For example, for registration fees for teachers to attend a math conference, budgeted at \$2,500, an acceptable cost basis format could be “registration fees for five teachers at \$500 per person.”
- ☐ *Amount Budgeted:* Enter the total amount budgeted for the item(s).