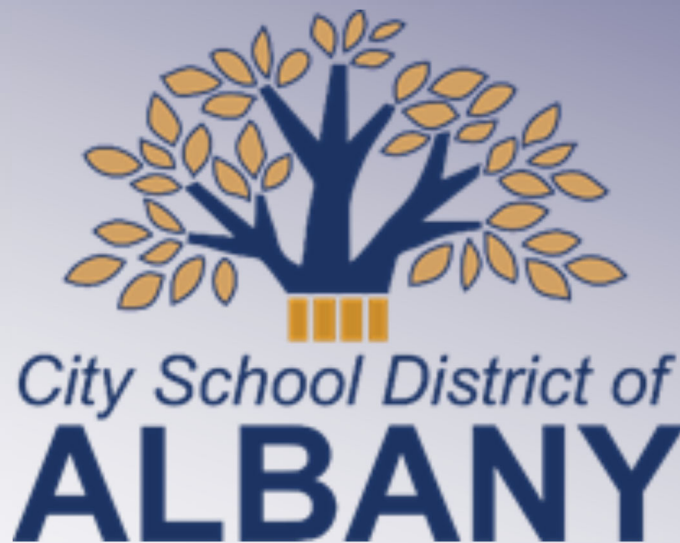


GRANTS HANDBOOK


2022-2023

Programmatic, Fiscal, and Management Responsibilities
Frequently Asked Questions & Answers
Sample Forms



**City School District of Albany
Office of Grants and Program Development (OGPD)**

**Office of Grants and Program Development (OGPD)
1 Academy Park, Albany, NY 12207**

: **518.475.6080**

: **518.475.6084**

OGPD Staff Members

Eileen Leffler *Director*
eleffler@albany.k12.albany.us

Shakiya Wilson *Office Manager*
swilson@albany.k12.albany.us

Melinda Britton *Senior Account Clerk*
mbritton1@albany.k12.albany.us

OGPD Mission

To seek funding to support programs that support the educational, emotional and social needs of City School District of Albany students through both competitive application processes and government entitlements.



INTRODUCTION

The Office of Grants and Program Development (OGPD), along with the Business Office, Human Resources, and the Purchasing Office, wants your grant efforts to succeed. As a recipient of a Grant and/or as your role as Project Coordinator, you will guide your grant from implementation to conclusion. Protocols and procedures have been established to assist you in your efforts and to help us meet the district's legal and fiscal responsibilities.

This handbook is designed to answer common questions regarding the process of receiving and implementing grants for our school district. Given the varying nature of some grants and their requirements, please feel free to contact the OGPD with any questions or concerns.

Please keep in mind that the district handles more than \$30 million in grant funding. *Meeting deadlines and conducting timely budget reviews is not an option - it is an essential responsibility* as the procedures and records of grants are audited annually. The OGPD thanks you in advance for your cooperation in these matters and we look forward to working with you to implement your grant funded activities.

Grant Recipient/Project Coordinator

Duties

Programmatic Responsibilities

- **Have knowledge of the grant program:**
 - Access and become familiar with the funding agency's original grant announcement (Request for Proposal), the CSDA's grant final proposal, and proposed budget.
 - Carry out activities included in the proposal and approved by the funder.
 - Record and maintain an internal record of grant activities completed.

- **Communicate with relevant partners:**
 - Maintain communication with the funder.
 - Cooperate with building principals for use of staff and space.
 - Coordinate with buildings and grounds, if necessary.
 - Coordinate with Communications Office for publicity and district website postings.
 - Facilitate collaborative relationships between the CSDA and grant partners.

Fiscal Responsibilities

- **Spend grant funds for authorized purchases and activities:**
 - Submit appropriate forms to the OGPD for review.
 - Work with OGPD to ensure accurate district protocol is followed for all contracted services.
 - Encumber and/or spend down all grant funds, including any necessary supplies and materials by **April 1** for grants ending June 30, **June 1** for grants ending August 31 (with the exception of those grants that have summer programming), and **July 1** for grants ending September 30. No requisitions will be accepted after these dates without prior authorization by the OGPD.
 - Ensure receipt of all supplies and materials by confirming that all shipments were received, signing off on the Purchase Order Receiver's Copy, collecting packing slips, and checking that all orders are complete by **June 17** for grants ending June 30, **August 16** for grants ending August 31, and **September 16** for grants ending September 30.
 - Complete all grant funded hourly compensated activities (i.e. PD, curriculum writing, etc.) by the following dates: **June 17** for grants ending June 30, **August 16** for grants ending August 31, and **September 13** for grants ending September 30.
 - Ensure all timesheets are accurately completed, signed, entered onto the appropriate service sheet, and that the service sheets are sent to the Grants Office for review per the annual schedule provided.

- **Review grant budget and on-going spending:**
 - Maintain accurate records of all purchases via an internal budget tracking spreadsheet provided by OGPD to keep track of grant expenditures.

- Review monthly budget summaries sent by OGPD each month verify report for accuracy.
 - Provide the OGPD with written justification for any unspent grant funds by **June 30**. This document will accompany the final fiscal report and be signed by the Superintendent.
 - Work with the OGPD to submit budget amendments to the funder if expenses are anticipated to exceed the approved spending in each spending category, if necessary.
 - Provide notification of funding changes that may impact the general fund. This may occur if there are insufficient grant funds to support grant activities and would be approved by the OGPD in consultation with the Business Office.
- **Key fiscal deadlines:**

	For grants ending June 30	For grants ending Aug 31	For grants ending Sept 30
Encumber and/or spend 90% of all grant funds, including all necessary supplies and materials	April 1	June 1	July 1
Purchase all necessary supplies and materials	April 1	June 1	July 1
Confirm receipt of all supplies and materials	June 17	Aug 16	Sept 16
Complete all grant funded hourly activities and collect final timesheets for hourly work	June 17	Aug 16	Sept 13
Complete and send payroll service sheets to OGPD	June 19	Aug 20	Sept 16
Send written justification for any unspent grant funds, if applicable	June 30		

Management Responsibilities

- **Maintain oversight of personnel funded by grant:**

- Coordinate with Human Resources regarding the posting and hiring of new staff positions within the first 3 months of grant for new grant awards.
- Ensure all employees paid from new or renewed grants are approved by the Board of Education (Form A). This includes completing and submitting Form A to the OGPD, in accordance with the Human Resources deadline and Board meeting schedule.
- Collect timesheets (Form D) for all employees paid on an hourly basis, enter the timesheet data onto service sheets and submit the service sheets to OGPD for review per annual schedule (unless otherwise directed). All original timesheets [Form D] must be submitted to the OGPD along with completed service sheet.
- Submit certification sheets for both employees paid 100% out of a grant and for employees paid less than 100% out of a grant to OGPD. These forms (Form C) will be provided to you by the OGPD. Submission due dates will be included on the forms.
- Review monthly staffing lists sent by OGPD and verify for accuracy.
- Communicate projected staffing changes for subsequent year to the OGPD.

- **Complete required reports to funder:**

- Coordinate with OGPD about deadlines for required reports due.
- Request data records used for reporting purposes from the Office of Data, Assessment & Technology in a timely manner.
- Complete all required reporting materials and send to the OGPD at least one week prior to funder's due date. This includes completing programmatic and fiscal related reporting materials. The OGPD will review and finalize, then submit final documents to funder.

- **Consider sustainability of grant program:**

- Collaborate with the OGPD in seeking new funding streams and renewals.

Notify the OGPD if technical assistance is needed.

Required Paperwork

As the Grant Recipient/Project Coordinator, you are responsible for reviewing, collecting, and submitting the following forms to the OGPD (unless otherwise stated) by their due dates. Forms are available electronically through the “Grants Portal for Staff” directly: <http://webhelp.albany.k12.ny.us/grantsportal>.

FORM A: Request for Board of Education Approval for Grant-Funded Employees

Every employee receiving payment from a grant above and beyond their contractual salary (i.e. afterschool tutoring, stipends) must be approved by the Board of Education (BOE) before s/he can be paid. Send the form to the OGPD, who will then forward to Human Resources (HR). HR will ensure that the names of listed employees are included on the next BOE agenda.

FORM B: Budget Summary/Multiple Account Transaction Report AND Earnings by Account Number or Internal Budget Tracking Spreadsheet:

The OGPD will send this summary to you each month, which highlights the expenses charged to your grant, including the employees who have been paid out of the grant. You are responsible for reviewing reports for accuracy and alerting the proper offices (Payroll or Purchasing) if they are inaccurate.

FORM C-1: Semi-Annual Certification Form for Employees-Individual

Grant Personnel who are 100% funded from the grant. If you have employees paid contractually from your grant), you are responsible for collecting their signatures and submitting these forms to the OGPD two times per year (by **January 31** and again by **June 27**).

FORM C-2: Semi-Annual Certification Form for Employees-Group

Grant Personnel who **are not 100% funded** from the grant. If you have employees paid contractually from your grant), you are responsible for collecting employee signatures each month, but they should only be submitted to OGPD two times per year (by **January 25** and again by **June 25**).

FORM D: Grant Timesheet (Grant-Funded Service & Certification Form)

If you have employees paid hourly/per diem from your grant), you are responsible for collecting employee signatures, entering the data onto a service sheet, and submitting the service sheet along with original timesheets to OGPD according to the annual schedule provided schedule (separate attachment). You can consult with OGPD for assistance with creating and completing service sheets.

Grant Forms



REMINDER:

All forms can be found electronically in the OGPD internal drive: <http://webhelp.albany.k12.ny.us/grantsportal>

Form A	9
Request for Board of Education Approval for Grant-Funded Employees	
Form B Part 1	10
Multiple Account Transaction Report	
Form B Part 2	11
Earnings by Account Number (Payroll Summary)	
Form C-1	12
Semi-Annual Certification Form for Employees- Individual	
Form C-2	13
Semi-Annual Certification Form for Employees- Group	
Form D	14
Grant Timesheet (Grant-Funded Service & Certification Form)	



City School District of Albany

Office of Grants and Program Development

FORM A: Request for Board of Education Approval for Grant-Funded Employees

Grant Title: Sponsor A Scholar

Budget Code: FSS10

Signature of Project Coordinator/
Principal: John Smith

School Building/Location: Tony Clement Center for Education (TCC)

Signature of Grants Administrator: Eileen Leffler

**** FOR HUMAN RESOURCES USE ONLY ****

Date Submitted to HR: _____

Date Approved by BOE: _____

Date Submitted to BOE: _____

Date Approval Notice Sent to OGPD: _____

Note: Sort alphabetically by last name first

Employee	Regular District Job Title	Grant-Related Work/ Title	Salary	Payment Schedule	Dates of Service
LaMont, Juan	Teacher	Academic Coach	42.50	Hourly	9/1/2022-6/30/2023
Lopez, Anita	Teacher	Academic Coach	42.50	Hourly	9/1/2022-6/30/2023
					9



City School District of Albany

Office of Grants and Program Development

FORM C-1: Semi-Annual Certification Form for Employees serving a Singular Cost Objective -INDIVIDUAL

Employee:		Job Title:	
Federal Program:	[Grant Name]	CFDA #:	
Reporting Period:	July-December January-June <i>circle one</i>	Fiscal Year	2022-2023
Project Coordinator:			

I hereby certify that I have worked 100% of my time under the following single cost objective:

[Describe Single Cost Objective (job description and duties) under the grant program here.]

Employee Signature:	Date:
Project Coordinator Signature:	Date:
Grants Administrator Signature:	Date:

Instructions

- Grant-Funded Employee:** Complete; sign and date; forward to Project Coordinator by the last week of December and June.
- Project Coordinator:** Review for accuracy; sign and date; forward to Grants Office by the second week of January and July.
- Grants Administrator:** Review for accuracy; sign and date; enter into *Employee Certification Database*; file.



City School District of Albany

Office of Grants and Program Development

FORM C-2: Semi-Annual Certification Form for Employees serving a Singular Cost Objective -GROUP

Federal Program:	[Grant Name]	CFDA #:	
Reporting Period:	July-December January-June <i>circle one</i>	Fiscal Year	2022-2023
Project Coordinator Name/Title:			

This is to certify that the following individuals have worked 100% of their time under the following single cost objective:

[Describe Single Cost Objective (job description and duties) under the grant program here.]

Employee Name	Building	Position

I have first-hand knowledge of the work performed by these individuals.

Project Coordinator Signature:	Date:
Grants Administrator Signature:	Date:

Instructions

Project Coordinator: Review for accuracy; sign and date; forward to Grants Office by the second week of January and July.



City School District of Albany

FORM D: Grant Timesheet (Grant-Funded Service & Certification Form)

Employee: Anita Smith **Regularly Assigned Building:** TCC

District Job Title: Teacher

Grant Title: Sponsor A Scholar

Grant Related Work: Academic Coach

Employee's Signature: *John Smith*

By signing this form, I certify that my work supported the grant identified below.

Grant Project Coordinator Signature:

By signing this form, I certify that this employee's work supported the grant identified below and that funds are budgeted and available in the grant to pay this employee.

Budget Code: FP10

DATE	Description of Work	TIME IN	TIME OUT	HOURS
8/1/2018	Tutoring-students	2:30pm	3:30pm	2
8/3/2018	Tutoring-students	2:30pm	3:30pm	2
8/5/2018	Tutoring-students	2:30pm	3:30pm	2
8/8/2018	Tutoring-students	2:30pm	3:30pm	2
TOTAL HOURS				8
Total Number of Hours Worked			Rate Per Hour	Gross Pay
8 hours			\$42.50	\$340.00

Other Guidance & Forms

Additional forms may be needed by Grant Recipient/Project Coordinators, but are not included in this handbook. Please remember to follow district procedures when completing these forms. Forms may be found:

- **Field Trip Request Form**
 - * Your Building's Main Office

- **Request to Attend a Conference Form**
 - * Your Building's Main Office

- **Requisition Form**
 - * Purchasing Office

- **Service Sheets**
 - * OGPD Office

- **Purchasing Information, Processing, and Travel Reimbursement**
 - * Purchasing Office

Frequently Asked Questions

Q. What are definitions of common terms used and forms referred to by the OGPD?

A. Request for Proposal (RFP): A document in which an organization announces that grant funding is available. An RFP usually contains details about the available funding such as eligibility and instructions for how to submit an application. RFPs may also be referred to as Request for Applications (RFAs) or Solicitations for Grant Applications (SGAs).

FS-10: The name of NYSED's budget form for grants, which contains a list of dollar figures and brief descriptions for how grant funds will be spent. The federal government has their own budget form for grants, Form 524.

Budget Narrative: A narrative description explaining how funds will be or were used as part of the grant. The budget narrative is often in text format and complements an FS-10 or Form 524.

Encumbrance: An "earmark" for funds to be used in the future. An encumbrance lets the OGPD and Purchasing Office know that the Project Coordinator intends to spend funds for a specific purpose later in the year. At the beginning of the grant year, Project Coordinators should encumber as much of the budget as possible for approval. Encumbrances often apply to purchases such as contracts. Note: All encumbrances must be spent or cleared by the end of the project period in order to close out the grant account.

Requisition: A request for approval to make a purchase in the immediate. A requisition lets the OGPD and Purchasing Office know the Grant Recipient/Project Coordinator plans to spend funds for a specific purpose immediately. Requisitions often apply to purchases such as supplies and materials.

Purchase Order (PO): A document generated by the Purchasing Office in response to an encumbrance or requisition request. A PO states the type, quantity, and agreed-upon price for products or services a vendor will provide to the CSDA. Once generated, the Purchasing Office submits the PO number to the vendor as reference for payment.

Invoice: Bill and/or receipt for expenses from the vendor, which includes vendor information, description of the purchase, quantity, and agreed-upon costs.

Budget Code: A specific number assigned and used internally by the OGPD, Business Office, and Purchasing Office which summarizes the grant title, year of grant, and category of expenditure.

Personnel Questions

Q. Why do employees need to be approved by the Board of Education (BOE) in order to be paid out of a grant?

A. Only the BOE has the legal authority to hire employees. Therefore, all staff requires some form of BOE approval; no one can be paid out of a grant without this approval.

Q. If I am a grant-funded employee, does this impact my tenure, seniority, or job security?

A. Being grant-funded does not affect your tenure or seniority if you are in a tenure-track position. If a grant is no longer funded, seniority takes precedent as related to job security.

Q. Why do I need to sign a Annual Certification Form for *Grant Personnel* (Form C)?

A. Federal and state audit procedures require that all grant-funded employees certify that the work for which they are paid is grant-related. This is either done bi-annually or on a monthly basis which is determined on a case-by-case basis with guidance from OGPD.

Budget Questions

Q. How do I fill out the NYSED FS-10 budget form?

A. Note: FS-10s are applicable to grants from NYSED. Project Coordinators assist with completing an FS-10 if they are part of the original application process, need to make changes to the current budget, or are renewing the grant for a subsequent year. Expenditures included in a budget must be in direct support of grant activities approved by the funder. All expenses are designated to a specific budget category or code listed on the FS-10. Per the Uniform Grant Guidance, all allowable and unallowable expenses for individual grants by funder must be followed, reviewed and approved by the Department Director/Supervisor and the Director of Grants.

The following budget codes are included in the FS-10:

150 – Instructional Staff: Employees who are members of the Teachers Retirement System. Usually includes teachers, teacher stipends, teaching assistants, substitute teachers, and administrators.

160 – Support Staff: Employees who are members of the Employees Retirement System. Usually includes clerical staff, teaching aides, custodians, hall monitors, etc.

400 – Purchased Services: Contracted service providers for specific programs, such as a YMCA after-school program; Professional Development consultant; Summer Institute Speaker (including the speaker's estimated honorarium, travel and expenses). Receipts are required for reimbursement for tolls, meals, rooms, etc. Costs relating to courier service or metered postage should be included in this category. Stamps are usually purchased out of petty cash and should be included in Supplies and Materials (code 450).

Note: District employees cannot be paid from this budget code; they must be included in code 150 or 160.

- 450 – Supplies & Materials:** Includes all materials that have a unit cost less than \$5,000 (with the exception of some Federal grants). For example, a specific item might include Habits of Mind (30 copies @ \$100 each = \$3,000 total). If specific titles of materials are not known, they can be identified as such: Training Videos (12 copies @ \$100 - \$150 each = \$1,500 total).
- 460 – Travel:** This code includes pupil transportation (field trips, bus tokens), conference costs (registration, hotel and meal expenses), and mileage reimbursement for staff travel between schools. A travel form must be attached to all requisitions. Receipts are required for reimbursement for tolls, meals, rooms, etc. [Contact the Purchasing Office for the current mileage reimbursement rate and for travel forms.]
- 800 – Employee Benefits:** Benefits are based on salary totals from codes 150 and 160. Benefits for Social Security, retirement, workers compensations, and unemployment insurance are required for all district employees (including substitute teachers and staff receiving stipends). Health insurance is required for full-time employees and for some part-time employees. TRS is computed from totals in code 150 only; ERS from code 160 only. [Contact the OGPD for current rates.]
- 900 – Indirect Costs:** Some grants allow the district to charge for administrative or accounting costs to process grants (check the RFP). This amount is based on the sum of all preceding codes multiplied by the NYSED approved indirect cost rate for the CSDA. The indirect cost rate is annually determined and varies from year to year.
- 490 – Purchased Services:
with BOCES** Includes contractual services provided through BOCES.
- 300 – Minor Remodeling:** Include description of work to be performed, calculated costs and total expenditure proposed. This budget line is rarely used for grant applications.
- 200 – Equipment:** Includes all individual items with a unit cost of \$5,000 or more. This budget line is rarely used for grant applications.

Project Coordinators must stay aware of the original FS-10 and approved expenditures, as well as monitor spending in each budget code. They cannot arbitrarily overspend in one budget code because they have funds available in another. NYS has strict accountability regulations and an amendment form may be required if funds are to be transferred from one code to another. Some grants from other funders do not allow amendments, so miscalculations can create major problems for the general fund.

Other parts of the FS-10 form include:

- Budget Summary:** Transfer totals to the last page (whole numbers only)
Agency Code: 010100010000
Project Number: xxxx xx xxxx (if pre-assigned, this number will change annually)
Agency Name: City School District of Albany
Signature: Kaweeda G. Adams, Superintendent of Schools
(Note: Leave the date and signature lines blank)

The Superintendent is always listed as the contact person. This is done in order to direct all award notifications to the district office for better tracking and accountability. You may add your name in parenthesis after the Superintendent's name to identify yourself as the person who actually prepared the document.

Q. What happens if I anticipate spending more in a certain budget code than what was originally approved?

- A. The Project Coordinator is expected to stay within budget as much as possible. In the case of grants funded by NYSED, if an expense will be more than 10% of that budget code's approved allocation, the Project Director can submit a budget amendment to the OGPD. For example, a grant was approved to spend \$100,000 in budget code 450 - Supplies and Materials and \$50,000 in budget code 460 - Travel. The Project Coordinator wants to spend \$107,000 on materials and only \$43,000 on travel. Because the additional \$7,000 is less than \$10,000 (10% of \$100,000), the Project Coordinator does not need to file an amendment. However, if they wanted to spend \$110,001 or more from the 450 code, the Project Coordinator would need to submit a budget amendment. Amendments may be submitted to the OGPD at any time of year and no later than 30 business days prior to the grant's end date.

Q. What happens if I have unspent funds after my grant period ends?

- A. Unless the grant specifically allows "carry over" into the following year, the CSDA loses access to all remaining funds after the grant period ends. If there are unspent funds, Project Coordinators are required to provide the OGPD with a written rationale as to why the funds were not spent, which will be submitted to the Superintendent with the final fiscal report.

Purchasing Questions

Q. How do I start to spend grant funds?

- A. The Project Coordinator can begin drawing down grant funds for approved activities and expenditures by submitting appropriate documentation to the OGPD and Purchasing Office. If expenditures are identified but are not to be immediately purchased, the Project Coordinator can submit an encumbrance to the OGPD. For approval to make immediate expenditures, the Project Coordinator can submit a requisition to the OGPD. All expenditures must be

approved by the OGPD. Faculty/staff are not encouraged to make purchases on their own and submit for reimbursement.

Q. How do I encumber funds?

- A. If you have been given access to your grant funds through nVision, you will input a new requisition following the procedures provided by the Purchasing Office. For encumbrances, please be sure to type “To encumber:” in the description box before entering the description of the materials/services you are creating the encumbrance for. A Purchase Order will then be sent to you. Once the materials arrive, or the services have been rendered, sign the Purchase Order, attach the packing slip or invoice with supporting documentation and submit to Purchasing.

If you do not have access to nVision, you will fill out a paper requisition form identifying the vendor and the amount you want to set aside for the future purchase. You will then submit the requisition to the OGPD, who will forward to the Purchasing Office. The Purchasing Office will create a Purchase Order in nVision and the OGPD can then track the encumbrance as a charge to the grant’s budget. You will be responsible for providing all packing slips to the OGPD when materials arrive and/or reviewing invoices and supporting documentation for any services rendered before directing the OGPD to finalize payment on any encumbrances.

Q. When can requisitions be submitted?

- A. Requisitions may be entered into Finance Manager or submitted to the OGPD once the CSDA receives the grant approval letter and the OGPD sets up the budget codes into Finance Manager. All requisitions must be submitted according to the following cut-off schedule:
- Grants ending in June: 90% of contractual expenses must be encumbered by **April 1**.
 - Grants in other months: 90% of contractual expenses must be encumbered by **90 days prior** to the end of the grant.

Q. How do I encumber funds for future expenses that will occur after the cut-off date for purchase orders?

- A. Encumber funds as directed on page 21. If some funds are needed sooner, a partial payment can be made. If you encumbered the funds through Finance Manager, you will send a copy of the Purchase Order to Purchasing directing them to make a “Partial Payment”. Indicate the amount you wish paid and include back-up documents to support the partial pay request (i.e. packing slip, invoice). When you are ready to make the final payment on a Purchase Order, indicate that it is a “Final Payment” and follow the same procedure.

If you submitted a paper requisition to the OGPD, you will notify the OGPD that you wish to make a partial payment on the desired Purchase Order (include the PO #), indicate how much and include back-up documents such as packing slips or invoices. When you are ready to make the final payment on a Purchase Order, notify the OGPD that it is a “Final Payment” and follow the same procedure.

Q. What happens after I’ve submitted my requisition request?

- A. If there are sufficient funds in the budget code specified by the Project Coordinator on the requisition, the Purchasing Office will produce a Purchase Order (PO) and submit it to the

vendor. The Purchasing Office needs at least 5 business days to process/submit orders, so Project Coordinators should plan accordingly.

Q. Why can't I buy supplies with my own personal funds and submit receipts for reimbursement?

- A. Only the Purchasing Office can obligate the District financially. If you buy items without prior authorization from the Purchasing Office, you may have to return the goods or pay for the goods yourself. While unavoidable in certain circumstances, reimbursements are not the recommended procedure and should not be a routine practice while implementing grants. Reimbursements can take 6-8 weeks, so you should plan accordingly.

Q. Where can I make purchases for supplies or obtain services from?

- A. The CSDA has a specific purchasing procedure, which may include reviewing the CSDA's bid list, reviewing a list of preferred vendors with NYS contracts, soliciting quotes for select supplies and services, undergoing an approval process for vendors and contracted services, and requiring specific documentation from approved vendors. Please consult the Purchasing Office's rules and procedures for further detail.

Q. Can I place orders online?

- A. Yes, as long as the vendor accepts purchase orders online. You must submit a requisition with appropriate quotes where applicable. Once you receive the Purchase Order (PO) Receiver's Copy, you may place the order using the PO Number. Please note we cannot purchase items online from Amazon.com.

Q. Who do I contact if there is a problem with an order?

- A. You can contact the Purchasing Office or the vendor directly. **Note: If items are being returned for credit, you must notify the Purchasing Office as soon as possible so that correct payments are made.**

Q. Can I personally pick up items to save money for shipping if a vendor is local or shipping is not available (i.e.: Teacher's Store in Latham)?

- A. If items need to be picked up, you should submit a request for purchase order with a note that the vendor purchase order should be sent directly to you rather than the vendor. Contact the Purchasing Office for estimated turn-around time needed to get the vendor purchase order to you. You can then make arrangements for pick-up. When the order is complete, submit the signed receiver's purchase order copy and any other related receipts to the Purchasing Office. Please note, it will be your choice to pick items up, so mileage claim forms will not be accepted for doing so.

Q. How do I make arrangements for attending a conference?

- A. Refer to the Travel and Conference Guidance –Purchasing Department.

Q. How do I request reimbursement for travel-related expenses from conferences?

- A. Conference reimbursement requests should be submitted immediately after travel. The attendee must complete the conference reimbursement expense log, sign and obtain the Administrator/Supervisor/Department Head's Signature. Remember to attach all **original itemized receipts** to an 8 ½ x 11 sheet of paper and a copy of the approved Conference Request Form. Contact the OGPD, Purchasing Department or refer to the Conference Instructions for additional information/guidance.

Q. What is the current mileage rate?

- A. Currently, the mileage reimbursement rate determined by General Services Administration (GSA) is \$0.58/mile effective January 1, 2019 www.gsa.gov/mileage. However, since this rate changes periodically, contact the OGPD or Purchasing Office to confirm.

Grant Process

Q. Does the OGPD write all grants for the district?

- A. No, we do not have the capacity to accomplish this task. We usually take the lead on competitive grants that have an annual budget of more than \$10,000 and require the coordination of multiple partners or participants. With many smaller and non-competitive grant opportunities, we encourage others to take the lead. However, we request that you involve us in the process early on to ensure that all grant submissions support and align with district goals. We will always be available to assist with developing budgets, especially in regards to determining the required fringe benefits, health insurance and indirect cost rates. We will offer technical assistance with the project narrative, if desired, and if time permits.

Q. Once we have obtained a grant award, what happens next?

- A. Following receipt of the official award letter, an implementation meeting will be held with the OGPD, identified Grant Recipient/Project Coordinator, Senior Account Clerk, and any other related personnel. Budget codes will be established, job postings submitted if necessary, and any other needed actions to begin the successful implementation of the grant.

Q. Who writes mid-year and final-year reports?

- A. Project Coordinators are responsible for leading the programmatic and fiscal aspects of all reports. This includes writing narrative sections and contacting any evaluators or Office of Data and Technology to obtain required data points. Grant Recipient/Project Coordinators are also expected to complete the fiscal component by spending down all grant funds, tracking outstanding orders, and ensuring all encumbrances are liquidated. It is imperative to provide any needed back-up documentation (such as requisitions, partner invoices, etc.) to complete the report. The OGPD will provide assistance in completing reports. Both the Grant Recipient/Project Coordinator and OGPD are responsible for submitting reports to the funder. Failure to submit reports on time may result in delay or denial of funds.

Q. Why does the OGPD need copies of all reports, including mid-year and fiscal reports?

- A. NYSED requires the maintenance of official files for all grants for the mandatory retention period; the OGPD is the designated site for these files.

Useful Phone Numbers:

OGPD Office: 475.6080

Business Office: 475.6020

Purchasing Office: 475.6050

Appendix

Purchasing Guidance and Forms

Purchasing guidance and forms are also available in the internal OGPD drive for your reference (<http://webhelp.albany.k12.ny.us/grantsportal>) and can also be obtained from the Purchasing Department