

# **AACPS Grant Project Manager Handbook**

**Prepared by the Development Office  
Fall 2004**

**This manual is also available on the Internet at  
<http://www.aacps.org/aacps/boe/admin/development/homepage.html>**

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## Introduction

This handbook was developed by the AACPS Development Office to describe the responsibilities of grant project managers. The purposes of the handbook are

- (1) to provide grant project managers with an understanding of their responsibilities in administering a grant-funded program;
- (2) to provide answers to frequently asked questions; and
- (3) to provide technical assistance and resources for carrying out management responsibilities.

This handbook is available on the Development Office homepage at <http://www.aacps.org/aacps/boe/admin/development/homepage.html> . We are always happy to answer questions and provide technical assistance. Our phone number is 410-222-2908.

## Responsibilities of the Grant Project Manager

The grant project manager is the person who is responsible for conducting the project according to the proposal plan. As grant project manager, it is your job to ensure that project outcomes are accomplished. This means that you provide overall leadership of the project team. Your duties include supervising project personnel, developing a working relationship with the funding agency, working with project partners and developing new partnerships, overseeing grant procurement activities, supervising progress of the project, managing the project budget, preparing project reports, creating project sustainability, and ensuring that all AACPS policies and funder requirements are followed.

### Getting Started

If you were part of the grant proposal writing process, you are already familiar with the project plan. However, it is possible that you were assigned to the grant project after the proposal was submitted and the funding received. In either case, you need to become very familiar with the project plan, objectives, budget, evaluation, and intended outcomes.

First, *read the Request for Proposals (RFP)*. The grant proposal was written based on the requirements of the RFP.

*Read federal, state or funder guidelines* that govern the use of funds. These guidelines (and legislation, in the case of federal or state funds) are usually included in the RFP. Federal guidelines are on the funding agency's homepage (for the U.S. Department of Education: <http://www.ed.us.gov> ).

*Obtain a copy of The Education Department General Administrative Regulations* (known as "EDGAR"). You will need to refer to EDGAR when you have questions about guidelines that apply to the management of federal grants from the U.S. Department of Education. Because many funds distributed by the Maryland State Department of Education (MSDE) come from the federal government, EDGAR guidelines also apply to many state programs (for example, Safe and Drug Free Schools, 21<sup>st</sup> Century Community Learning Centers, Title II). You can download a copy of EDGAR at <http://www.ed.gov/policy/fund/reg/edgarReg/edgar.html> .

When you have finished reading the proposal, read it again. And again. The project plan (that is, the activities and outcomes in the proposal) is the plan that the funder is supporting. You need to be intimately familiar with the project plan.

*Read the official notification of award* from the funding agency (MSDE, USDE, foundations). The award notification is a legal document and has important information pertaining to the management of your grant project, including:

- The project period (beginning and ending dates)
- The name and contact information of the Program Officer at the funding agency. This person is your first point of contact with the funding agency.
- The grant award number. You will refer to this number, which is unique to your project, when you correspond with the Program Officer and when you submit reports.
- The dollar amount of the award and how to access the funds
- Terms and conditions of the grant award, including reporting requirements and authorization for modifications of the project

Create a tentative project timeline, based on the proposal. This is your day-to-day, month-to-month working plan. Although this working plan may be modified during the life of the project, it is important that you begin with a plan that includes proposed activities and outcomes.

Take advantage of technical assistance:

- Call the Development Office to make an appointment for individualized project management orientation. (410-222-2908)
- Contact the Grants Accountant for budget set-up and assistance. (410-222-5200)
- Contact the project funding agency to begin developing a working relationship with the your Program Officer (your point of contact with the funder).

### Hiring Personnel

Your budget may include funds to hire part-time and/or full-time personnel. All personnel must be hired according to AACPS Board Policy and regulations. Contact the Human Resources Office (410-222-5061) for assistance and information about hiring procedures.

All employees who are paid with federal grant funds are required to document their time by signing a Grant Certification Sheet for each payroll period. These sheets are sent to all payroll clerks. This is a federal requirement.

Teachers who are on 10-month contracts sometimes participate in grant-funded activities which take place after their contracted work hours. This work might be in the evening, on Saturday, or during the summer. You will need to process payment for these teachers using the 'GHRs Overtime and Additional Compensation Report - Request for Payment' form . This form

### **Little Help Box**

Contact the Development Office at 410-222-2908 to:

- get a copy of the RFP.
- get a copy of the proposal/budget.
- receive help on interpreting EDGAR and/or funder guidelines.

is available on the Minerva Intranet System, which you can access through the AACPS homepage (<http://www.aacps.org>). On the top right, click on “Human Resources”. Scroll down and click on “For Current Staff” on the left. Then click on “Minerva.” You will need to provide your user name and password to enter the system. After you enter the Minerva system, click on “Forms”. Next Click on “Human Resources” and scroll down to “Payroll”.

For payroll questions, contact the Payroll Office (410-222-5210). The Timekeeper or Business Manager in your school or department is also a good resource for payroll information.

## **Managing the Grant Budget**

### Tracking Your Budget

As the Project Manager, you are responsible for oversight and management of project funds. All expenditures must be based on your proposed project and must support the outcomes that were proposed and approved by the funder.

The AACPS Grant Accountant will work with you to ensure proper compliance with funder, government, and school system fiscal regulations. The Grant Accountant will also prepare all fiscal reports to the funder.

You should become familiar with allowable costs and any restrictions that apply to your project. For federal and state grants, allowable costs are outlined within the Request for Proposals and/or EDGAR. You should also refer to OMB Circular A-87 (from the U.S. Office of Management and Budget) for further guidelines on allowable costs. OMB Circulars can be downloaded at <http://www.whitehouse.gov/omb/circulars/>.

Familiarize yourself with the proposal budget. This is the budget that the funder has approved. The budget tells you how you may spend grant dollars.

Many grant project budgets include *cost-sharing or in-kind budgets*. Cost-sharing (cash) or in-kind (the value of services or materials) contributions represent the amount of money and/or effort that the school system and its partners are contributing to the overall cost of the project. Examples of in-kind items include staff time that is devoted to the project, facilities usage, postage costs, travel expenses, or materials. In most cases, your project will have in-kind contributions, rather than a cash match.

At a minimum, you are required to cost-share the amount that is in the proposed budget. This means that if the approved proposal budget lists a \$100,000 cost-share, you must provide a \$100,000 cost-share. You must document all cost-share/in-kind expenses.

As project manager, you are responsible for maintaining and tracking the cost-share/in-kind budget.

### **Little Help Box**

Individualized project management orientation provided by the Development Office includes:

- review of the RFP & grant proposal
- information on compliance for your project.
- project recordkeeping.
- templates for maintaining non-federal match budget records.
- assistance in setting up timelines.

The Development Office can assist you in setting up simple in-kind budget management databases. The Development Office will also provide guidance on placing a value on goods and services within your in-kind budget.

### Purchasing Supplies and Equipment

The Purchasing Office (410-222-5160) has developed a User's Manual for use in processing requirements to purchase materials, supplies, services, maintenance and construction and to contract with vendors (including the project evaluator and consultants). All purchases that you make must follow the guidelines given in the User's Manual. The manual is available on the Minerva intranet system.

Access to Minerva is through the AACPS homepage (<http://www.aacps.org>). Click on "Human Resources". Then go to "For Current Staff" and click on "Minerva". You will need to provide your user name and password to enter the system. When you reach the Minerva system, click on "Publications" and scroll down to the Purchasing Division User's Manual.

Contact the Purchasing Office to obtain a procurement card, which is similar to a credit card. Procurement Cards are used to make minor purchases of \$750 or less.

As part of your project, you might contract with consultants and/or contractors to deliver services such as staff development or evaluation. Board Policy and Regulations apply when using grant funding. If the consultant was named as a partner in the grant proposal, you will be able begin the contract process fairly quickly. If the consultant or contractor was not named in the grant proposal, you will need to contact the Purchasing Office for technical advice to acquire the needed goods and services. Contact the Purchasing Office as soon as you know what your consultant/contractor needs are. Staff in the Purchasing Office will guide you through the process.

The Business Manager in your school or department is also a good resource for purchasing information.

### Paying for Teacher Substitutes

Occasionally, grant funds will pay for a substitute teacher when the regular teacher participates in grant-funded professional development. Before you can charge the cost of substitutes to your grant budget, you will need a *substitute meeting code*. The Grant Accountant (410-222-5200) requests substitute meeting codes to be set up for grants. After the code is assigned, you will receive a message from the Division of Human Resources Substitute Office. This message will include the budget account number which you should use to pay for substitutes. You must request a substitute meeting code each budget year of your grant.

### Budget Reports

It is important that you maintain a balanced and up-to-date budget. What does this mean? Basically, you need to ensure that the money that you think you have spent matches the expenditures on the official budget that is maintained by the AACPS Grant Accountant.

Each month you will receive a budget print-out, known as “blue bars”, which gives details on expenditures to your budget. The monthly budget report can be somewhat intimidating, if you have never seen one. However, the Grant Accountant will help you to interpret the “blue bars.” You should compare this budget record with your own budget records. If there are discrepancies, contact the Grant Accountant. S/he will work with you to make corrections, as needed.

### Budget Modifications

Grant funded projects are dynamic and ‘living’. The proposal that was approved by the funding agency was a plan for achieving desired outcomes. In reality, as projects are implemented, modifications are made to meet the needs of the population that is being served and to adjust to unanticipated events and/or challenges.

Changes in project activities may require budget changes. Modifications to the budget are usually allowed, but each funder has its own restrictions regarding changes to the budget. MSDE, for example, requires that budget amendments be submitted at least 45 days prior to the end of the project. The Grant Accountant approves budget amendments before submission of the funder. Budget amendments must be approved by MSDE before implementation of the changes.

Samples of MSDE grants budget forms are available on the MSDE website at:

<http://www.marylandpublicschools.org/MSDE/divisions/superintendent/grants/Budget+Information> .

Review your grant award documentation and any governing legislation and guidelines for your project. The Development Office can assist you in interpreting guidelines. The Grants Accountant will facilitate the budget modification process and will provide you with guidance on record-keeping for auditing purposes.

### **Non-budgetary Changes to the Project**

#### Modifying Project Activities and Outcomes

Your project was funded based on the proposal that was written and submitted to the funder. This proposal represents an agreement with the funder to conduct designated activities and to achieve proposed outcomes. No project is static, however. Programs change in response to the needs of the population that you are serving. It is common to change proposed activities in a project, as long as the new activities support the proposed outcome of the project.

It is **not** commonly accepted practice to request a change in proposed outcomes. The funding agency has provided money to support very specific outcomes. The bottom line is that the funder is paying you, as a representative of the school system, to achieve those outcomes. Therefore, you should be very judicious in requesting major changes to outcomes.

Each funder will have specific guidelines and requirements regarding project changes. Contact the Development Office for assistance in interpreting funder requirements and requesting project changes.

## Personnel Changes

Occasionally, project personnel assignments change due to reassignment, resignation, or leave of absence. When key personnel in a federal project change, the funder must be notified and give approval for the change. Each funder will have guidelines for making personnel changes. These guidelines may be detailed in your official grant award or in published guidelines (such as EDGAR for the U.S. Department of Education). The Development Office can assist in interpreting guidelines and working with funders to make personnel changes.

## **Additional Information**

### Copyright

It is your responsibility to ensure that all project personnel are informed of copyright guidelines and restrictions. Copyright information is included on the AACPS Media homepage at <http://www.aacps.org/aacps/boe/instr/curr/lms/trcopyright.htm> . More complete information is available at the U.S. Copyright Office homepage at <http://www.copyright.gov> .

Occasionally, grant projects include the development of materials. These materials are the property of AACPS. Materials that are created using public funds (federal and state monies) are generally in the “public domain” and are not able to be copyrighted. The Development Office can assist you in finding additional information about copyrighting your materials.

### Designing and Printing Materials:

Design and Print Services (410-222-5100) creates professional quality graphics, brochures, pamphlets, and photographs. When requesting services from Design and Print, let them know that the cost will be covered by grant funds. In general, grant budgets can not reimburse AACPS Design and Print Services for printing performed internally. Design and Print Services can facilitate external printing for your project. They also assist with the development of Powerpoint Presentations. When you have large quantities of photocopying, Design and Print Services can copy for you.

Plan ahead: allow two weeks for bulk copying.

### Disseminating Information About Your Project:

Personnel in the AACPS Public Information Office are marketing and communication experts. They have direct and regular contact with the media and they facilitate communication between the community and the school system. Contact Public Information (410-222-5316) for information about school system regulations for public dissemination of information. Remember that all publications must comply with AACPS standards and guidelines.

The Development Office can brainstorm with you to create a dissemination plan, both formal and informal.

## Leave Requests

All employees are entitled to leave days of varying types. Information on leave is included in the Employee Handbook, which is on the Minerva Intranet system (Go to the AACPS homepage at <http://www.aacps.org> . Click on “Human Resources” and scroll down to “For Current Staff.” Then click on “Minerva.” Click on “Publications” and scroll down to the Employee Handbook.)

Personnel that are paid with grant funds and that you supervise will need to submit a Leave Request Form to you for approval and signature. Leave Request Forms are available from the timekeeper in your school or department or from the Payroll Office (410-222-5210).

## Mileage Reimbursement

All employees are to be reimbursed for the use of private vehicles while performing authorized school system business. In some cases your project budget allows for mileage reimbursement for grant personnel travel related to project activities. Requests for reimbursement are made on the “Mileage Reimbursement Form”. Forms should be available in your school or department office, from the Accounting Office (410-222-5236), or from Design and Print Services (410-222-5100).

All out-of-state travel must be approved by the Deputy Superintendent of Schools.

## Nonpublic School Participation

If the grant project that you are managing is funded by federal money, you are probably required to include nonpublic school students and teachers. Many federal education programs under the Elementary and Secondary Education Act, as reauthorized under the No Child Left Behind Act (NCLB), require the equitable participation of nonpublic school students, teachers and other education personnel. The law requires that local school districts engage in “timely and meaningful” consultation with appropriate nonpublic school representatives in order to administer benefits through these programs.

This regulation includes projects that are funded directly from the federal government, as well as projects from the Maryland State agencies that are distributing federal funding (such as Title II and the 21<sup>st</sup> Century Community Learning Centers).

It is possible that the grant proposal for your project includes information about nonpublic school participation. However, if your proposal does not include information about nonpublic school participation, do not assume that nonpublic schools are not eligible to participate.

Contact the Development Office for information about the nonpublic school participation requirements in your project.

## Privacy of Student Records and Student Information

As project manager, it is your responsibility to adhere to all federal, state and AACPS regulations regarding the privacy of student records and information. Board Policy 907: Student Records provides regulations and guidance governing the management of student records. Board Policy is available on the school system homepage (<http://www.aacps.org>; click on “Board of Education” and then on “Board Policies and Administrative Regulations”). Your principal or immediate supervisor can provide you with additional information on the privacy of student records.

In general, all student information should be stored in locked files or cabinets. Access to the files should be limited.

## Professional Development

Many grant projects include professional development activities. When you plan activities, check the ERO system, which is an online calendar of professional development opportunities.

County professional development activities are listed on the online Staff Development Calendar, ERO. ERO allows employees to locate and register for professional development opportunities online or over the telephone. Professional development sponsors should list activities and maintain attendance records through the ERO system. ERO also enables sponsors to access data, create reports, communicate with registrants, and view evaluation results online. For more information about ERO contact the Office of Staff Development at (410) 721-8336.

The school system offers a wide range of professional development activities. Contact Staff Development (410-721-8300) to discuss how your project can build on currently existing opportunities.

Remember, too, that all professional development beyond regularly contracted hours must be paid at the appropriate negotiated rate.

## Site Visits

Occasionally, the project funder will ask to have a site visit in order to review the progress of your project. This is an opportunity for you to highlight the successes of your project, discuss challenges, and expand your working relationship with your Program Officer. If the funder requests a site visit, you do not have the option to decline. In fact, the funder probably will provide a date and time for the visit. Your program officer may also suggest an agenda.

Before the visit, ask your Program Officer what he or she would like to accomplish during their visit. You should also make suggestions. Ask if they will have specific questions that need to be answered or if there are particular people that they would like to meet. Create a written agenda and send it to the funder prior to the visit. Prepare to answer questions. Be honest, open, and hospitable.

The Development Office can provide guidance in organizing your site visit.

## **Sustaining Project Outcomes**

Your project has been funded for a specified period of time. It is important to realize that grant money does not last forever. The funding will end. When that happens, you want to be able to sustain successful outcomes of your project. This does not mean that every activity within the project will be sustained, nor will all personnel be sustained. Sustainability means that the *desired outcomes* of the project will be institutionalized.

You need to begin early to plan for sustainability. Sustainability can be created by institutionalizing activities and partnering with outside agencies, as well as seeking additional funding to continue the project.

Early in the project, you should develop a sustainability plan. Work with your project staff, school personnel, and external partners to create programs that can continue without additional funding. As you plan for sustainability, consider these questions:

- Which activities can be maintained through the school's regular budget?
- Can some activities continue through volunteer or partnership efforts?
- What additional resources are needed?

Plan ahead! A successful project is a sustainable project. Don't get caught at the end of your project with no ability to sustain your successes.

## **Reporting on the Project**

Every funded project will require some type of reporting during and at the end of the project. At the very least, you will be asked to report on project progress to your immediate supervisor. You may also be asked to report to school system upper management and to your partners. Each funder has specific requirements for reporting, including annual performance reports (APR) and a final report. As project manager, you are responsible for preparing all programmatic reports and working with the Grant Accountant, as needed, on fiscal reports.

It is important that you develop a record-keeping system, so that you will be able to write thorough and accurate reports. Contact the Development Office for suggestions.

### Evaluation of the Project

Your project proposal included a description of the evaluation of project outcomes. Federal and state funded projects require significant data-based reporting on outcomes. You may be working with an external evaluator to collect and analyze project data and project successes.

At the beginning of the project, you need to establish a working relationship with the evaluator and create a timeline for data collection and evaluation. Your evaluator is your resource for determining the kinds of data that are needed.

The project evaluator is responsible for preparing evaluative reports on the project outcomes. Evaluation during the project informs project implementation. In other words, regular evaluation of your project will help you to make programmatic adjustments in order to more effectively achieve your outcomes. External evaluators can provide guidance in making these adjustments.

### **Little Help Box**

The Development Office is your resource for

- locating and/or creating appropriate templates for data management.
- guiding you to AACPS resources for collecting evaluation data.

## Reporting and Disseminating Information About Your Project

As project manager, you are ultimately responsible for disseminating information on the success of your project. There are many ways to share project success, including reports to AACPS management, articles in the newspaper, informational brochures about your project, a project homepage, and presentations to community groups.

As you share information, remember to *always* acknowledge your funder and partner contributions. Contact the AACPS Public Information Office for assistance and guidelines for working with the media.

### **Little Help Box**

AACPS Print and Design Services creates professional quality brochures, videos, and photographs.

The Public Information Office has direct contact to local, regional and national media.

## **Documenting the project**

Keeping a record of your project is important for both legal and reporting purposes. Project records document compliance with legal requirements, provide support for audits and serve as a basis for reporting to stakeholders.

The following is a list of records that need to be kept for grant projects:

- Funder/legal documents
  - RFP and project proposal
  - Approved budget
  - Administrative guidelines and regulations
  - Official notification of award (send original to Development Office; maintain one copy)
- Budget records. In addition to records that are maintained by Central Office, you need to keep:
  - Copies of all contracts and blanket agreements for consultants and trainers
  - Copies of purchasing documents
  - Copies of monthly statements for procurement cards issued to your project
  - Copies of your expenditure/income tracking files
  - Copies of the monthly 'blue bar' sheets

- Copies of all reimbursement requests
- All correspondence with the funder regarding budget
- Copies of payroll documents
- In-kind budget databases
- In-kind documentation of expenses
- Personnel Records:
  - Job descriptions
  - Staff resumes
  - Staff performance evaluations
  - Staff schedules
  - Staff and volunteer sign-in sheets (time-tracking sheets)
  - Time and Effort Documentation
- Programmatic Records
  - Staff phone numbers/email
  - Program Officer contact information
  - Project Timelines
  - Minutes of meeting
  - Project sign-in sheets
  - Surveys and results
  - Data: This is dependent on your proposed outcomes, but may include the number of people served, attendance, services offered, grades, surveys
  - Press releases, newsletter, brochures, publicity, videos
  - All correspondence with the funder
  - All project reports (Always send a copy of major reports to the Development Office.)
  - Any records that document problems and successes

**Little Help Box**

When in doubt, ***DON'T*** throw it out.

Ensure that the Development Office has:

- a copy of the RFP and complete proposal
- the original copy of the project notification of award
- all major reports
- all records when you leave the project or at project close-out.

Contact the Development Office for information on record keeping.

As a general rule, AACPS is required to maintain all records related to your project for 5 years *after completion of the project*. Board of Education Administrative Offices retain records for purchasing, personnel, budgets, pay and other official documents for 5 years. As grant project manager, you should maintain all records, including correspondence and data, for the duration of the project. If you leave the project (or the school system) before the project ends, all records should be given to the new project manager (or, if a new manager has not yet been assigned, to the Development Office to hold until a new manager is assigned). At the end of the project, send all records to the Development Office for storage. Project records are the property of AACPS.

### **Extension of the Project**

Federal and state grant projects may be continued for up to one year beyond the funding period if progress is being made toward the outcomes, all reports have been submitted, and there is money remaining in the budget. The length of the extension varies, however; you discuss with your program officer the requirements of your particular grant-funded program.

MSDE requires that a project continuation be requested at least 45 days prior to the end of the project period. MSDE must approve the continuation. The Grant Accountant will help you facilitate a continuation request.

The U.S. Department of Education allows a grantee, under most circumstances, to extend the project period of an award one time for a period up to twelve months without prior approval. This is referred to as a “no-cost” extension. This means that there is an extension of *time* to complete your project; this not a request for additional funding. Even though permission from USED is not required to extend the project, you should notify your Program Officer in writing 60 days in advance.

### **Ending the project**

At the end of the project, you will submit a final report to the funder. Each funder has specific requirements for reporting, but in general, the report will include a fiscal report, a narrative of project activities and outcomes, an evaluation of the success of the project, and information on project sustainability.

When the project is completely closed, send all documentation to the Development Office for storage.

## Glossary

**APR:** Annual Performance Report required on federal grants

**Authorizing legislation:** the law(s) that govern the use of public funds

**Budget Modifications:** Changes in your approved budget that allow movement of money from one budget category to another. A budget modification does not include a request for additional funding.

**C-125:** MSDE's budget form for grant programs

**Cost sharing/matching/in-kind funds:** fairly synonymous terms that refer to the portion of the project costs that are not paid by the funder. These are real dollars or in-kind contributions (such as facilities and/or personnel salaries) that the applicant is willing to set aside and commit to the implementation of the project. Cost-share, matching, and in-kind funds must be managed in the same the way as the funder's budget. That means that use of these funds must comply with regulations for allowable costs.

**Direct costs:** costs which are specific to the project (e.g. salary, project materials, transportation)

**Discretionary grant:** an award that is made based on a competitive review process in which applicants submit proposals to the awarding agency

**Dissemination:** The results of the project that are shared with others

**EDGAR:** Education (U.S.) Department General Administrative Regulations: Administrative regulations that govern USED's discretionary grant and cooperative agreement programs. grants

**Encumbrances:** money that you have committed to spend, but has not yet been paid

**Fiscal Year (FY):** The budget year for an agency or organization. The federal government's fiscal year is October 1 to September 30. The state government and AACPS's fiscal year is July 1 to June 30. Other funders may have a fiscal year of January 1 to December 31.

**Fixed charges:** required costs above salary (e.g. unemployment insurance, workman's compensation)

**Formula grant:** Funds from the federal government to eligible applicants (usually state agencies) for which the amount is based on a formula established by legislation. States agencies receive and distribute most formula grants. Title I is an example of a formula grant.

**Fringe benefits:** "Optional" personnel costs in addition to salary (e.g. health insurance, retirement)

**GEPA:** General Education Provisions Act. Grant applicants are required to include in their proposal a description of steps that they will take to ensure equitable access to and participation in a federally funded project. The statute highlights six types of barriers that can impede access: gender, race, national origin, color, disability or age.

**Goal:** a general outcome that a project will achieve over the entire period of the grant funding. The goal addresses the main problem that is identified in the needs assessment.

**GPRA:** Government Performance and Results Act of 1993. This Act requires that all federal projects demonstrate their effectiveness based on specific indicators and standards, which serve as benchmarks. Grant projects are measured based on certain levels of performances annually.

**Grant Award Notification:** official documentation notifying the recipient of funding. This document often includes information on budget and reporting. It provides the name of the program officer in the funding agency, the award amount, and terms/conditions of the award.

**Grant:** funding provided by a government agency, foundation, corporation, or other external source that requires a written proposal for a particular purpose over a specified period of time. Grants may be awarded non-competitively or through a competitive selection process.

**Grantmaker:** agency that gives money

**Grantseeker:** agency that is looking for money

**Guidelines:** procedures laid out by the funder that grantseekers must follow when approaching a funder for money

**Impact Evaluation:** focuses on outcomes or payoffs that result from a project

**Implementation Evaluation:** Assesses how a project is delivered and whether it is delivered as it was proposed

**Indirect costs:** Costs that are difficult to itemize, because they are part of the normal operating budget. Often these costs are negotiated between the applicant and the funding agency. These may be listed as administrative costs or overhead costs.

**In-kind support:** Sometimes referred to as cost share. The amount of money which the applicant is spending on the project (e.g. cost of facilities, cost of salary not paid through the grant, volunteer time)

**Key Personnel:** The management team on a grant project

**MOU:** Memorandum of Understanding—spells out the duties and responsibilities (including cash match or in-kind services) of each partner in a project

**MSDE:** Maryland State Department of Education

**No-cost Extension:** an extension of time—not money--given by the funder to complete a project.

**Objective:** An outcome statement with a deadline. Objectives reference specific measurable data and progress toward a goal

**Outcomes:** Outcomes are statements that explain how the target population will improve as a result of the project. Outcomes are measurable and have deadlines.

**Partner:** Partners bring resources and expertise to a grant-funded project. They contribute something in addition to receiving funds for services.

**Performance report:** A report of activities that have been conducted during the grant period

**PR/Award Number:** a unique number assigned to your project, in order to identify it. This is also referred to as “award number.”

**Program Officer:** Usually the first point of contact with a funding agency. The Program Officer oversees the application process and manages the project for the funding agency.

**Qualitative Evaluation:** Evaluation that is primarily descriptive or interpretive

**Quantitative Evaluation:** Evaluation that uses numbers and data analysis based on statistical methods

**Regulatory Guidance:** Provides non-binding guidance and interpretation of federal requirements for the layperson

**Replication:** The project is able to be duplicated in other settings

**RFP:** Request for Proposals. The RFP describes the available grant funding, priorities, guidelines, and format that are required in the proposal.

**Sustainability Plan:** A plan, often written in the proposal, that describes how a project will continue or be funded after the requested funding ends

**Technical Assistance:** Operational or management assistance. MSDE and USDE also provide technical assistance to LEAs. The AACPS Development Office provides technical assistance to grant project managers.

### Offices With Grant-Related Responsibilities

What you need to accomplish	Who can help
Starting your project Answers to questions Changing project personnel Technical assistance on project management Locating AACPS resources Setting up and managing the in-kind budget Communicating with the funding agency Developing partnerships and collaborations Seeking additional funding	Development Office, Green Street 410-222-2908
Setting up your budget and tracking funders \$\$ Understanding the monthly budget statements Managing the budget Interpreting funder fiscal requirements Modifying the budget categories Preparing fiscal reports Closing out the project budget	Grant Accountant, Riva Road 410-222-5200
Hiring personnel	Human Resources, Riva Road 410-222-5600
Processing reimbursements for expenses	Accounting 410-222-5210
Hiring consultants Purchasing supplies and materials Obtaining a procurement card	Purchasing Office, Riva Road 410-222-5601
Processing stipends for teachers	Payroll 410-222-5210
Collecting and analyzing data related to project outcomes	Division of Program Planning/Research and Assessment 410-222-5140
Sharing information about the project	Public Information Office, Riva Road 419-222-5312
Printing and designing publicity information Copies of the Mileage Reimbursement Bulk copying Assistance with PowerPoint Presentations	Design and Print Services 410-222-5100
Assistance with Technology	Help Desk 410-222-5135
Offering professional development	Staff Development 410-721-8300

## Internet Resources

AACPS Homepage: <http://www.aacps.org>

AACPS Board of Education Policies:  
<http://www.aacps.org/aacps/boe/board/newpolicy/Policies.asp>

Development Office Homepage:  
<http://www.aacps.org/aacps/boe/admin/development/homepage.html>

EDGAR: <http://www.ed.gov/policy/fund/reg/edgarReg/edgar.html>

Maryland State Department of Education: <http://www.marylandpublicschools.org/MSDE>

Minerva, the AACPS Intranet System: This system contains many documents relating to system management. Access to Minerva is through the AACPS homepage (<http://www.aacps.org>). On the homepage, click on “Human Resources”. Then school to “For Current Employees” and click on “Minerva”. You will need to provide your user name and password to enter Minerva.

Resources on Minerva include:

- Driving Directions to Schools
- Central Office Centrex
- Employee Handbook: In Minerva, click on “Publications” and scroll down to the Employee Handbook
- Purchasing Division User’s Manual: In Minerva, click on “Publications” and scroll down to the Purchasing Division User’s Manual.
- Personnel Forms: In Minerva, click on “Forms” and then “Human Resources” .
- AACPS Memo Template: In Minerva, click on “Forms” and then “Forms”.

OMB Circulars: <http://www.whitehouse.gov/omb/circulars>

U.S. Department of Education: <http://www.ed.gov/>

## **Attachments**

**Supervisor's Guide to Grant Project Management Accountability: Administrative "Look Fors"**

**Non-Federal Match Time tracker sheet**

<p style="text-align: center;"><b>Supervisor’s Guide to Grant Project Management Accountability Administrative “Look Fors”</b></p>
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***The grant project manager is responsible for conducting the project according to the proposal plan. It is her/his job to ensure that project outcomes are accomplished, by providing overall leadership of the project team. Duties include:***

- *supervising project personnel*
  - *developing a working relationship with the funding agency*
  - *working with project partners and developing new partnerships*
  - *overseeing procurement-related activities (e.g. vendor contracts, purchasing)*
  - *supervising progress of the project*
  - *managing the project budget*
  - *preparing project reports*
  - *creating project sustainability*
  - *ensuring that all AACPS policies and funder requirements are followed*
- 

***The following is a list of key aspects of grant project management. Use these “look fors” to guide your supervision of grant project managers.***

**Programmatic Management**

- Understands legislation and regulations that support the grant project
- Understands the project outcomes and focuses on strategies that directly lead to the outcomes
- Demonstrates that all activities support the goals of the school system and are related to school improvement plans
- Understands and can explain how the activities of a project may or may not be modified
- Has developed and adheres to a project timeline that reflects the proposed activities and that is adjusted as needed throughout the project. The timeline is a working calendar that includes:
  - Management activities
  - Implementation activities
  - Deadlines for reporting
  - Evaluation activities
  - A system for tracking successful completion of activities
- Shares the timeline with the project team and school staff
- Collaboratively modifies activities in order to
  - avoid duplication of services within the school
  - maximize school resources
  - achieve project outcomes most efficiently and cost-effectively
- Demonstrates that the project is becoming sustainable, using a variety of strategies such as:
  - increasing partnerships and volunteer activities

- sharing resources and activities with other school-based or systemwide programs
- encouraging activities and strategies that become the “way of doing business”
- seeking additional resources

### **Communication/Team Building**

- Articulates to staff at all levels:
  - the goals and outcomes of the grant project and its impact on students
  - allowable and unallowable activities and costs
- Demonstrates that
  - Principals and supervisors are aware of and supportive of the project through, for example:
    - regular updates on progress
    - collaborative planning of activities that integrate with other school programs
    - coordination of project activities with other school programs
    - participation on school committees and in school activities, as appropriate
    - school displays that highlight project successes
    - project information in school newsletters
    - principal and administration participation in project activities
  - The project team regularly discusses activities, resolving any issues together
  - Principals and team members are able to articulate goals of the project and discuss how activities support school and systemwide goals.
  - All stakeholders (parents, community, teachers, staff, evaluators) are familiar with project activities
- Demonstrates and documents a working relationship with the project funding agency
- Documents the successful participation of partners and develops new partnerships by, for example:
  - Collaborating with the school-based point of contact for business partnerships
  - Establishing clearly defined and realistic goals for the partnership
  - Determining mutual needs and expectations of the project and the partner
  - Clearly defining partner & project expectations, roles and responsibilities
  - Identifying services and available resources
  - Creating on-going monitoring and evaluation of the partnership
- Provides timely and regular feedback to the project evaluator
- Provides an update to supervisor on a regular basis

### **Budget Management**

- Maintains up-to-date budget records
- Understands budget categories and is able to articulate appropriate expenditures within those categories
- Understands and can explain activities that are allowable within the grant project
- Documents non-federal match budget
- Provides up-to-date information on encumbered and expended funds
- Processes procurement requests in an efficient and timely manner
- Documents budget and purchasing records
- Processes payroll and stipends in a timely and accurate manner

- Works with the Grant Accountant to process budget modification requests in a timely manner

### **Recordkeeping and Documentation**

- Maintains project records in an easily accessible location, and in addition. . .
  - Ensures that student records are securely stored and access is limited, in accordance with Board Policy and Regulations
- Maintains a database of progress toward project outcomes
- Demonstrates that the database is regularly updated
  - Provides data related to progress toward outcomes in an efficient and timely manner
  - Provides project evaluator with timely and accurate data
- Maintains an on-going working relationship with the project evaluator
- Prepares and submits all required project reports on time

### **General Management Skills**

- Documents regular monitoring of project personnel activities
- Demonstrates an ability to locate information and to access support services within the school system
- Accesses technical support services of the Development Office

(Use this sheet to keep track of time that is spent on the grant project, but is not paid for with grant funds.)

**Non-Federal Match Time Tracker Sheet**

**EMPLOYEE NAME:** \_\_\_\_\_ **Social Security #:** \_\_\_\_\_

Week Beginning Monday, \_\_\_\_\_

<u>Description of Task</u>	<u>Commenced Work at:</u>	<u>Finished Work at:</u>	<u>Time Spent</u>	<u>Daily Totals</u>
<b><u>MONDAY</u></b>				
<b><u>TUESDAY</u></b>				
<b><u>WEDNESDAY</u></b>				
<b><u>THURSDAY</u></b>				
<b><u>FRIDAY</u></b>				
<b><u>SATURDAY</u></b>				
<b><u>SUNDAY</u></b>				
<b>Signature:</b> _____			<b>TOTAL FOR THE WEEK:</b>	