



# CITY SCHOOL DISTRICT of ALBANY

Office of Instruction

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September 10, 2019

**TO:** Principals and Grant Project Coordinators

**FROM:** Eileen Leffler, Director of Grants and Program Development

**DATE:** September 2019

**RE:** Grant Programmatic, Fiscal, and Management Responsibilities

The following information provides guidance and reminders of protocols and procedures for implementing and monitoring grants. I have enclosed a revised copy of the **Grant Coordinator's Handbook 2019-2020 and an Appendix of Forms** to use along with the items in this memo. Please discard earlier versions of this handbook and forms as some of the forms and information have been updated from previous versions.

1. Please refer to the **Grant Coordinator's Handbook 2019-2020** for due dates, forms, and other responsibilities.
2. It is your responsibility to track and manage your grant or grant allocation budget. For Grant Project Coordinators, a **Budget Summary** generated from nVision will be sent to you monthly for your review and verification. Please refer to the handbook for guidance. For Principals who have grant allocations (i.e. SIG Basic and Title I parent & tutor funds), you will need to set up a tracking system to track your expenditures. A monthly excel summary will be provided for you to reconcile with your tracking.
3. For Grant Project Coordinators, a **Payroll Summary** generated from nVision will be sent to you monthly for your review and verification. Please inform the Grants Office whenever there is new contractually hired staff that will be paid from the grant you coordinate.
4. A grant-funded **Request for Board of Education (BOE) Approval** must be submitted for all personnel paid with grant funds **prior** to beginning any grant-funded work. These forms should be submitted to the OGPD for review, approval and signature. Once the OGPD has approved, the approval form will be submitted to Human Resources. Please allow adequate time for approvals to be reviewed and processed. If there are questions regarding the approval process and timeline, please contact the OGPD.
5. **Employee Certification Forms** will be sent to you to distribute to all staff funded by the grant you coordinate (contractually or stipend). The forms will indicate whether these need to be done monthly or bi-annually for each employee. Please verify that all the staff designated to be paid contractually

#### VISION STATEMENT

*The City School District of Albany will be a district of excellence with caring relationships and engaging learning experiences that provide equitable opportunities for all students to reach their potential.*

#### MISSION STATEMENT

*We will work in partnership with our diverse community to engage every learner in a robust educational program designed to provide the knowledge and skills necessary for success.*

from your grant are included and inform the Grants Office of any errors or additions. As new staff are hired, please consult with the Grants Office to determine the correct form to be used.

6. Please be sure to encumber (obtain a Purchase Order) grant budget items early and before the cut off dates indicated in the handbook. The handbook provides details and description of encumbrances.
7. **Field Trip Requests:** Some grants have field trips budgeted. Please follow the updated 2019-2020 Field Trip Procedures.
8. **Conference Request Forms:** Any conference-related expenditures must have approval before a requisition can be created. It is the attendee's responsibility to work with the Office of Curriculum & Instruction to request a Purchase Order for any registration fees, hotel accommodations or airfare/train transportation.
9. **All purchases/commitments REQUIRE A PURCHASE ORDER** prior to any services rendered or purchases. **You should not be receiving services or purchase anything in advance of receipt of a P.O. from purchasing. The P.O. is generated from the completed Requisition. Please understand that it is important to submit for a P.O. well in advance of when you need materials or services. As a general rule, you should submit at LEAST two weeks in advance of when materials or services are needed.**

**As per district policy, a purchase order is required for all services and materials and should be requested in advance of any material before it is delivered or before any service is rendered.**

**The District is not obligated to pay for any material or service that has been ordered or purchased without a purchase order.**

**Please assume that the District will be unable to pay for or reimburse you for any unauthorized purchases. Unless it's a health and safety issue and/or emergency, a Purchase Order is required.**

10. **Contracted Services:** A blank template has been created to help with building a contract for purchased services, along with instructions and criteria for when a contract is required. Depending on the vendor's level of interaction with students, fingerprinting may be required per the contract. More details about contracts and fingerprinting are included. Or, you can contact Tyresha Moncrieffe in the Purchasing Department at x10025.
11. **Minority and Women Owned Business Enterprise (MWBE):** Your grant may require an MWBE goal. This means any contracted services or supplies that are budgeted in your grant must be purchased from an MWBE utilizing the purchasing procedures and obtaining quotes. Please contact the Grants Office for assistance with this process if your grant has this requirement.

**\*\*\*For those of you with Community Schools Aid funding:** Please submit all requests for Purchase Orders to the Grants Office. Indicate on the Requisition the following:

- Allowable Expense Category
- Budget code
- Brief description of the program that the requested purchases are for

If you have any questions about the content of this memo or need any assistance, please contact me. Thank you for your timely attention to these items.