Margins to Center
Grant & Project Management

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2022 SEED Grant

Program Period - October 1, 2022 thru September 30, 2025

Introduction to Grant Procedures

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What We Do

Grant Procedures

- Utilize PM best practices to achieve grant goals
- Provide support to Partner Sites
- Consult with American Institute of Research
- Contract Development

Fiscal Responsibility

- Create and approve budgets
- Create fiscal procedures for fiscal processing
- Assist Partner sites with fiscal responsibility
- Approve project costs
- Monitor and process project expense reporting

Compliance

- Support proper allocation of federal funding
- DoEd Data collecting and reporting
  - DoEd bi-annual reporting
- Provide resource materials on compliance

Grant Structure

From Margins to Center (M2C) work is funded through a Supporting Effective Educator Development (SEED) Grant awarded to the National Board from the US Department of Education.

As such, the National Board and Sites are subject to following federal regulations regarding using grant funds and keeping appropriate documentation.

Funding Structure

- This means National Board:

  - Is unable to make up front, lump sum payments to partners
  - Will create one contract with each M2C site
  - Providing funding on a cost-reimbursable basis through a Site Fiscal Agent

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Cost Principles

Allowable Costs
(§200.403)

General Considerations in Determining Allowability:

- Is the cost reasonable and necessary for the program?Is the expense in compliance with laws, regulations and grant terms?

- To what extent is the expense allocable to the grant?

- Is the cost adequately documented?

- Is it consistent with grantee rules that apply to both Federally funded and non-Federally funded activities?

Title 2 of the Code of Federal Regulations, Part 200 (2 CFR Part 200 Subpart E)

Reasonable Costs
(§200.404)

"A cost is reasonable if, in its nature and amount, it does not exceed that which would be incurred by a prudent person under the circumstances prevailing at the time the decision was made to incur the cost."

Considerations:

- Do sound business practices support the expenditure?

- In what ways does this expenditure lead to improvements in teaching and student learning?

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Food Costs

1) SEED funds can be used to pay for food costs that are part of a per diem or subsistence allowance related to allowable travel.

2) SEED funds may be allowable to support food costs that are a necessary and integral part of a conference, meeting, or training supported by the grant.

- These costs can't be duplicated in a per diem allowance.
- A situation in which participants will miss essential discussion, lectures, etc if they are required to purchase a meal outside the conference, meeting, or training (e.g., a working lunch during an all-day meeting).

- **Not allowed**

  - Regularly held 1 hour staff meeting
  - Banquet reception to honor teachers
  - Alcoholic beverages
  - Morning professional development workshop

- **Allowed**

  - On-site all-day professional development session when the cafeteria is closed and it is unreasonable for participants to bring lunch or have time to go out and get lunch during time allotted for the lunch break
  - Part of a per diem allowance related to allowable travel

Memorandum to ED Grantees Regarding the Use of Grant Funds for Conferences and Meetings & FAQ

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Travel

- Lodging

  - Traveler should adhere to the government's [General Services Administration per diem website.](#) website for all national averages, the maximum cost should not exceed $250.00 per night (excluding taxes and fees)

- Meals

  - Traveler should adhere to the government's [General Services Administration per diem website.](#) website for all national averages, the maximum cost should not exceed $65.00 per day.
  - Original itemized receipts are required.
  - Cost of alcoholic beverages will not be reimbursed.

[From Margins to Center Travel Policy](#)

- Flights

  - All travel must be booked coach or economy class. The use of "red-eye" or similar types offlights is not required. The cost of round-trip fare per trip is not to exceed $600.

- Mileage

  - Mileage must be documented
  - Will be reimbursed at current reimbursement rate established by the IRS

- Examples of non-reimbursable expenses

  - Airline upgrades or business class
  - Personal entertainment

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Conferences and Meetings

Attending a conference or meeting

- Funds can pay for attendance at a conference or meeting, including registration fees, travel, meals, etc.

- Number of attendees should be 'reasonable and necessary to accomplish the goals and objectives of the grant'

Hosting a meeting or conference

- Should be 'reasonable and necessary to achieve the goals and objectives of the grant'

- 'Follow all applicable statutory and regulatory requirements in determining whether costs are reasonable and necessary'

- Food costs can only be covered if it 'is necessary to accomplish legitimate meeting or conference business'

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Miscellaneous Costs

Advocacy and Lobbying

- Not allowable
  - Activities or products that address specific legislation
  - Activities that promote legislative action
  - Activities that could be in any way perceived as lobbying for support from policymakers

- Allowable
  - Activities or products sharing information about board certification, board-certified teachers, or teacher leadership and the related impacts on student learning (or other outcomes)

M2C Fiscal Guidelines and Procedures

Federal Cost Principles

Title 2 of the Code of Federal Regulations, Part 200 (2 CFR Part 200 Subpart E)

- Sections §200.421 through 200.475 identify the allowability of certain items

- Reach out if you have any questions concerning allowability of expenses

Matching Funds

Purpose

Build a support system and infrastructure for the long-term success and sustainability of the program.

Amount

Each Partner Site is responsible for a 25% matching contribution.

Specific amounts listed in contract and budget documents.

Matching Cost Examples

Examples of Allowable

- Candidate Fee reimbursements

- Teacher stipends

- Project staff salaries

- Costs for substitute teachers during trainings

- Technology integral to the project

Unallowable

- Funds from Federal sources

- Spending unrelated to the M2C program

- Spending that would supplant non-program funds

  - Cannot be spending that would be provided in the absence of the grant

- Indirect costs

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Budgeting Process

Budget Phase 1

Overview Budget - Due July 30th

1. Budget allocation for entirety of program
2. Budget narrative for each budget category
3. Matching funds narrative

Do **NOT** include the following expenses in budget:
- ATLAS licenses for candidates
- Travel expenses to M2C Network Convenings
- Costs associated with Affinity Spaces

Can only be covered by Matching Funds:
- Partner sites are only allowed to use up to 5% of SEED funds for candidate fees (candidate fees can be covered by Matching Funds or from other sources - strict restrictions apply)
- Stipends to candidates

M2C Budget Categories

Category	Planning Period Jul 23 - Sep 23	Program Year 1 Oct 23 - Sep 24	Program Year 2 Oct 24 - Sep 25	Total
Personnel				$0.00
Fringe Benefits				$0.00
Contractual				$0.00
Consultant(s)				$0.00
IT Consultant				$0.00
Marketing Consultant				$0.00
Stipends				$0.00
Equipment & Technology				$0.00
Travel Expenses				$0.00
Meeting Expenses				$0.00
Marketing Expenses				$0.00
Supplies				$0.00
Candidate Fees				$0.00
<Insert Category>				$0.00
Total	**$0.00**	**$0.00**	**$0.00**	**$0.00**

Budget Phase 2

Detailed Budget - Due August 30th

Sheet #1: Detailed Budget Overview

Budget Sections
- Staffing
- Activities
- Other

Make sure to select budget categories for any line item that contains a drop down.

Sheet #2: Monthly Budget Breakdown

Rows will change from gray to white once you have added a corresponding line item to the "Detailed Budget Overview".

"Actual" and "Variance" columns will be for use during the program to monitor your budget progress.

Pay attention to cell colors or notes that reflect you are over or under budget.

Sample Detailed Budget / M2C Budget Categories

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Things to Remember

- Budget Categories

  - Make sure you align expenses with the proper budget categories when submitting your budgets
  - When submitting expenses, you will be expected to match it to the corresponding line on your budget

- If you need to add any rows to your budget that do not already exist, let Claire know and she will add them (making sure all of the formulas are still working correctly)

- After budgets have been approved, any requests to change a budget will need to be approved before any new expenses have been incurred

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Expense Reporting

Documentation

Supporting documentation needed for expensed items:

- Receipts

- Invoices

- Time and effort report (payroll)
    - For 1 FTE, we need a salary letter
    - For less than 1 FTE, we need a time and effort report, accounting for hours put toward the project

- Justification for food costs

- Proof of Payment
    - Checks - must show: date, payee, amount, check number (check register preferred)
    - Corporate credit card: credit card statement and proof of payment of credit card statement

Memorandum to ED Grantees Regarding the Use of Grant Funds for Conferences and Meetings

Example food cost justification:

"For the two leadership training meetings[...] a light dinner was provided to these teachers as they attended these meetings 4:00-8:00 p.m., almost immediately after they finished their regular teaching duty day with school in session. It would have been unreasonable for participants to bring snacks or have time to leave the facility's premises to purchase dinner, as there was no time for breaks.

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Reporting Timeline & Info

Expenses will be submitted on a monthly basis - due on the 15th of the following month

Example: ALL expenses for October will be due November 15th

- Each expense will need to be tied to an activity and expense category from your budget

- Expenses that require pre-approval before time of purchase:
    - Items costing over $500
    - Travel (excluding travel to M2C Network Convenings)

- Note that we will be tracking your budget by expense category, not only overall budget

More information to come on the process for reporting expenses.

Closing Thoughts

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Reminders

- Reach out to Claire with any questions on allowable vs unallowable costs

- There will be more information to come regarding specifics on expense reporting

- When completing budgets -

  - Contact Claire if you need to add any additional lines to the budget
  - Make sure your expenses are aligned with the correct budget category
  - Keep in mind that when completing budget phase 2, you will have to specifically identify where your matching funds are coming from

- Changes to your budgets between phase 1 and phase 2 (and after phase 2) will need to be approved by Chae and Jennifer

We are here to help you! Don't hesitate to reach out!

Follow-up

Project Management team follow-up meetings with each site

- All meetings should be conducted before July 31st
- Attendees:
  - M2C - Jennifer and Claire
  - Partner Site - team member responsible for budgets and expense reporting, at least one member of from the leadership team
- Agenda: discuss budgets, expense reporting processes, fiscal guidelines, DoE regulations, and any remaining questions

Questions?

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