



Subgrantee Post-Award Webinar FY22 SOAR Act Formula Combined Consolidated Grant

March 2022 | Brianna Griffin

By the end of this training, attendees will...

- Understand expectations and requirements of the Fiscal Year 2022 (FY22) Scholarships for Opportunity and Results (SOAR) Act Formula Combined Consolidated grant, including:
 - Purpose of funds
 - Reimbursement request submission
 - Maintaining the Central Data application
 - Semi-annual narrative reporting requirements
- Know how to make changes to your project budget, if necessary
- Understand FY21 SOAR Formula Continuation funding, if applicable



Purpose of Funds

Background: Purpose of Formula Grants

Academic Quality	Early Childhood	ESSER III Equivalent
Projects designed to have a direct impact on student achievement , either school-wide or for specific subgroups of students	Supplementary activities that support school readiness , including the development of literacy and mathematics skills for early childhood students	Projects designed to respond to and recover from the impact that coronavirus (COVID-19) continues to have on schools including safely reopening school and addressing learning loss



Reimbursement Process

Award Periods

Grant Name	Award Period Begins	Award Period Ends
SOAR Academic Quality	July 15, 2021	Sept. 30, 2022
SOAR Early Childhood	July 15, 2021	Sept. 30, 2022
ESSER III Equivalent	July 15, 2021	Sept. 30, 2023

Reimbursement Process

- All OSSE grant funds are paid on a reimbursement basis.
- Subgrantees must submit a detailed expenditure summary (“reimbursement request”) to OSSE through the [Enterprise Grants Management System \(EGMS\)](#).
- Professional services (i.e., contracts) and equipment costs must have the following supporting documentation uploaded:
 - Proof of receipt of good/service (e.g., invoice)
 - Proof of payment (e.g., check, ACH confirmation)

Reimbursement Process

- OSSE will review expenditures for allowability to ensure that they align with the application budget and that they are:
 - Necessary
 - [Reasonable](#)
 - [Allocable](#)
- Subgrantees may submit amendments for shifts in the budget that do not alter the scope or objectives of the original project.
- Applicable regulations:
 - [2 CFR 200 - Uniform Grants Guidance](#)
 - [Education Department General Administrative Regulations \(EDGAR\)](#)

Reimbursement Process

- Subgrantees will be reimbursed via Automated Clearinghouse (ACH)/direct deposit.
- An LEA will receive payment within 20 days of receiving approval of their reimbursement request in EGMS.
- All reimbursement requests for funds obligated during the current fiscal year (ending Sept. 30, 2022) must be submitted by **Dec. 1, 2022**.
- Subgrantees are strongly encouraged to submit reimbursements on a regular basis (i.e., biweekly, monthly, or quarterly).

Know Your SAM Expiration Date

- In order to receive payment, subgrantees must maintain an up-to-date 2022 Central Data application in EGMS.
 - This includes the System for Award Management (SAM) Unique Entity Identifier (UEI) issued by SAM.gov and the SAM expiration date.
- It may take up to **30 days from initial submission** to process a reimbursement payment. Payment will not be processed if the SAM expiration date has passed.
- Make sure you know your SAM expiration date and aim to submit reimbursements at least **45 days prior** to this date.
- Renewing SAM and updating EGMS may take up to **20 days**.
 - Do not create any new reimbursement requests during this time.

If you need to update your SAM expiration date...

- Visit [SAM.gov](https://sam.gov) to renew the registration.
 - Please allow up to **10 business days** in case of delays.
 - If you run into issues with renewal, submit an [incident ticket](#) and/or contact the SAM help desk at (866) 606-8220.
- When you have received the updated registration, amend the 2022 Central Data application to update the expiration date and upload the new entity record.
 - Please allow up to **10 business days** for the Central Data application to be approved by OSSE.
 - Notify your SOAR grant manager once you have submitted the Central Data amendment.
- Once the Central Data amendment is approved, delete any created reimbursement requests that have not been submitted to OSSE and create a new request to automatically pull the new SAM expiration date from Central Data.

Common Reimbursement Issues

- OSSE may reject a reimbursement request if:
 - The expenditures do not align with the most recently approved SOAR Formula Combined Consolidated application budget.
 - Funds were obligated outside of the allowable award period dates.
 - Invoice and proof of payment is missing or incomplete for professional services or equipment costs.
 - The subgrantee's SAM expiration date has passed or is **within the next 30 days**.
 - Expenditures do not appear necessary, reasonable, or allocable to the project.



Semi-Annual Reporting

FY22 Reporting Periods and Deadlines

For LEAs receiving **ESSER III Equivalent** funding:

Reporting Period	Report Type	Deadline
7/15/21 - 3/31/22	Semi-Annual Narrative Report 1	Monday, May 16, 2022
4/1/22 - 9/30/22	Semi-Annual Narrative Report 2	Tuesday, Nov. 15, 2022
10/1/22 - 3/31/23	Semi-Annual Narrative Report 3	Monday, May 15, 2023
4/1/23 - 9/30/23	Semi-Annual Narrative Report 4	Wednesday, Nov. 15, 2023
7/15/21 - 9/30/23	Final Narrative Report	Wednesday, Nov. 15, 2023

FY22 Reporting Periods and Deadlines

For **all other LEAs**:

Reporting Period	Report Type	Deadline
7/15/21 - 3/31/22	Semi-Annual Narrative Report 1	Monday, May 16, 2022
4/1/22 - 9/30/22	Semi-Annual Narrative Report 2	Tuesday, Nov. 15, 2022
7/15/21 - 9/30/22	Final Narrative Report	Tuesday, Nov. 15, 2022

FY22 Reporting Periods and Deadlines

For **LEAs with FY21 continuation applications**:

Reporting Period	Report Type	Deadline
7/15/21 - 3/31/22	Semi-Annual Narrative Report 1	Monday, May 16, 2022
4/1/22 - 9/30/22	Semi-Annual Narrative Report 2	Tuesday, Nov. 15, 2022
7/15/21 - 9/30/22	Final Narrative Report	Tuesday, Nov. 15, 2022

Narrative Reporting

- The [semi-annual narrative reporting template](#) is an opportunity for subgrantees to share progress updates and highlights from their project, including:
 - Progress update on project activities listed in the approved performance measures template
 - Positive highlights of the program or project
 - Number of students, staff, family members, etc. impacted by the project
 - Academic outcomes impacted by the project and how they are being tracked
- Subgrantees are not required to submit evidence of project activities with each report submission; however, this documentation should be maintained by the LEA and may be reviewed during desktop or on-site monitoring.

Narrative Reporting

- Subgrantees that received multiple allocations (i.e., Academic Quality, Early Childhood, and/or ESSER III Equivalent) can complete one reporting template for all projects.
- FY21 continuation reports should be completed on a separate template.
- Email the completed reporting template as a Word document or PDF to your [OSSE grant manager](#) by the stated deadline.
- For the final narrative report, complete the final narrative section of the reporting template.



Budget Amendments

Budget Amendments

- Subgrantees may submit amendments in EGMS for shifts in the budget that do not alter the scope or objectives of the original project.
- Budget amendments must be submitted in EGMS and approved by OSSE.
- In addition to making changes to the budget line items, subgrantees are required to upload a “letter of rationale” to the Supporting Documentation tab, which must clearly outline changes to each budget category and provide reasoning for the shifts.
 - Please refer to the optional [letter of rationale template](#).
- **EGMS Tip:** You cannot have an open reimbursement request and an open amendment in EGMS at the same time.



FY21 Continuation Funding

FY21 SOAR Formula Continuation funding

- Subgrantees were allowed to carry over unexpended funds from their FY21 SOAR Formula Combined grant into FY22.
- Continuation applications are now live in EGMS and must be submitted by Friday, March 4, 2022.

SOAR Formula Combined

Grant: SOAR Formula Combined

Grant Type: Formula Grant

Application: 2022 - SOAR Formula Combined - 00

Revision: Original Application

Status: Not Submitted

Submissions due by: 3/4/2022 3:00 PM

[View Grant Application](#)

[View Payments](#)

[View Review Summary](#)

FY21 SOAR Formula Continuation funding

- Continuation applications include a budget and budget narrative, project description, and three to five project activities per reporting period.
 - Note that budgetary shifts are permitted through the continuation application but must be explained in detail in the budget narrative section.
 - All budgeted expenditures must align with the originally approved FY21 grant project application and objective(s).
- Subgrantees that submit a continuation application must complete semi-annual narrative reports by May 16, 2022 and Nov. 15, 2022.



Q&A

Contact Information

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*SOAR grant managers are listed by LEA in the allocations document on [OSSE's SOAR webpage](#)