Subgrantee Post-Award Webinar
FY22 SOAR Act Formula 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

<table>
<thead>
<tr>
<th>Academic Quality</th>
<th>Early Childhood</th>
<th>ESSER III Equivalent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Projects designed to have a <strong>direct impact on student achievement</strong>, either school-wide or for specific subgroups of students</td>
<td>Supplementary activities that <strong>support school readiness</strong>, including the development of literacy and mathematics skills for early childhood students</td>
<td>Projects designed to respond to and recover from the impact that coronavirus (COVID-19) continues to have on schools including <strong>safely reopening school and addressing learning loss</strong></td>
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</tbody>
</table>
Reimbursement Process
## Award Periods

<table>
<thead>
<tr>
<th>Grant Name</th>
<th>Award Period Begins</th>
<th>Award Period Ends</th>
</tr>
</thead>
<tbody>
<tr>
<td>SOAR Academic Quality</td>
<td>July 15, 2021</td>
<td>Sept. 30, 2022</td>
</tr>
<tr>
<td>SOAR Early Childhood</td>
<td>July 15, 2021</td>
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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://www.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](https://www.sam.gov) 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:

<table>
<thead>
<tr>
<th>Reporting Period</th>
<th>Report Type</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/1/22 - 9/30/22</td>
<td>Semi-Annual Narrative Report 2</td>
<td>Tuesday, Nov. 15, 2022</td>
</tr>
<tr>
<td>10/1/22 - 3/31/23</td>
<td>Semi-Annual Narrative Report 3</td>
<td>Monday, May 15, 2023</td>
</tr>
<tr>
<td>4/1/23 - 9/30/23</td>
<td>Semi-Annual Narrative Report 4</td>
<td>Wednesday, Nov. 15, 2023</td>
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<tr>
<td>7/15/21 - 9/30/23</td>
<td>Final Narrative Report</td>
<td>Wednesday, Nov. 15, 2023</td>
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FY22 Reporting Periods and Deadlines

For all other LEAs:

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FY22 Reporting Periods and Deadlines

For **LEAs with FY21 continuation applications**:

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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

- 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.
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.
# Contact Information

<table>
<thead>
<tr>
<th>Point of Contact</th>
<th>Contact Information</th>
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<tbody>
<tr>
<td>Marie Hutchins</td>
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<td>Stacy Kirk</td>
<td><a href="mailto:Stacy.Kirk@dc.gov">Stacy.Kirk@dc.gov</a></td>
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<td>Nicole Clements</td>
<td><a href="mailto:Nicole.Clements@dc.gov">Nicole.Clements@dc.gov</a></td>
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<td>Brianna Griffin, Manager, Office of Federal Programs and Strategic Funding</td>
<td><a href="mailto:Brianna.Griffin@dc.gov">Brianna.Griffin@dc.gov</a> (202) 355-8194</td>
</tr>
<tr>
<td>EGMS Helpdesk</td>
<td><a href="mailto:OSSE.Callcenter@dc.gov">OSSE.Callcenter@dc.gov</a> (202) 719-6500</td>
</tr>
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*SOAR grant managers are listed by LEA in the allocations document on OSSE’s SOAR webpage*