



Grantee Post-Award Webinar FY24 SOAR Formula Consolidated Grant

March 2024 | Jessica Mardo

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

- Understand expectations and requirements of the fiscal year 2024 (FY24) Scholarships for Opportunity and Results (SOAR) Act Formula Consolidated grant, including:
 - Reimbursement request submission
 - Maintaining the Central Data application
 - Semi-annual narrative reporting requirements
- Know how to make changes to your project budget, if necessary
- Receive additional resources to help support effective grant management



Reimbursement Process

Award Periods

Grant Name	Award Period Begins	Award Period Ends
SOAR Academic Quality	July 1, 2023	Sept. 30, 2024
SOAR Early Childhood	July 1, 2023	Sept. 30, 2024

- The award period indicates the time frame during which your local education agency (LEA) may carry out its approved SOAR project activities and incur grant-related expenditures.
- The award period also impacts how you approach your budget and reimbursement requests. Expenditures obligated prior to July 1, 2023 and after Sept. 30, 2024 cannot be reimbursed.
- However, you can still pay invoices to vendors after Sept. 30 through Nov. 30 for costs obligated during the award period (the earlier the better).
- You will have until Nov. 1, 2024 to submit any final budget amendments if needed.
- You will have until Dec. 1, 2024 to submit any final FY24 reimbursement requests.

Reimbursement Process

- All Office of the State Superintendent of Education (OSSE) grant funds are paid on a reimbursement basis.
- Grantees 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, Automated Clearinghouse [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](#)
- Grantees 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

- Grantees will be reimbursed via ACH/direct deposit.
- An LEA will receive payment within 30 days of submitting an approvable reimbursement request in EGMS.
- All reimbursement requests for funds obligated during the entirety of the award period (July 1, 2023-Sept. 30, 2024) must be submitted by **Dec. 1, 2024.**

Reimbursement Process

- Grantees are strongly encouraged to submit reimbursements on a regular basis (i.e., biweekly, monthly, or quarterly).
- All OSSE grantees must submit at least one reimbursement request per fiscal quarter in which funds were expended. **If a grantee does not adhere to this policy, it could be a contributing factor toward being selected for annual grants monitoring.**

Quarter	RR Submission Deadline
Oct. 1-Dec. 31	Jan. 31
Jan. 1-March 31	April 30
April 1-June 30	July 31
July 1-Sept. 30	Oct. 31

- Please note that the final deadline to submit reimbursement requests for the entirety of the award period will be **Dec. 1, 2024.**



Know Your SAM Expiration Date

- In order to receive payment, grantees must maintain an up-to-date 2024 Central Data application in EGMS.
 - This includes the System for Award Management (SAM) Unique Entity Identifier (UEI) issued by [SAM.gov](https://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 Central Data 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 2024 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.
- 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 or not process payment if:
 - The expenditures do not align with the most recently approved SOAR Formula Consolidated application budget.
 - Funds were obligated outside of the award period dates.
 - Invoice and proof of payment is missing or incomplete for professional services or equipment costs.
 - Expenditures do not appear necessary, reasonable, or allocable to the project.
 - The grantee's SAM expiration date has passed or is **within the next 30 days**.



Semi-Annual Reporting

FY24 Reporting Periods and Deadlines

Reporting Period	Report Type	Deadline
July 1, 2023- Jan. 31, 2024	Semi-Annual Narrative Report 1	April 15, 2024
Feb.1, 2024- Sept. 30, 2024	Semi-Annual Narrative Report 2	Nov. 15, 2024
July 1, 2023- Sept. 30, 2024	Final Narrative Report	Nov. 15, 2024

Narrative Reporting

- The [semi-annual narrative reporting template](#) is an opportunity for grantees to share updates and highlights from their project, including:
 - Progress update on project activities listed in the approved application's "Project Objective and Activities" tab
 - Number of students, staff, family members, etc. impacted by the project
 - Positive highlights of the project and any challenges experienced
 - Academic outcomes impacted by the project and how they are being tracked
- Grantees are not required to submit evidence of completion 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

- Grantees that received both Academic Quality and Early Childhood funding can complete one reporting template for both projects.
- Email the completed reporting template as a Word document or PDF to your [OSSE program contact](#) by the stated deadline.
- For the final narrative report, complete the final narrative section of the reporting template. You will submit this report at the same time as the second semi-annual report.
- **Pro tip:** After this webinar, add the reporting deadlines to your calendar, as well as reminders to yourself several weeks prior to the deadline. The SOAR program team will also publicize reminder announcements in OSSE's newsletters.
- **Late submission of reports could be a contributing factor toward a grantee being selected for annual grants monitoring.**



Budget Amendments

Budget Amendments

- Grantees may submit amendments for shifts in the budget that do not alter the scope or objectives of the original project.
- Budget amendments may be submitted retroactively, after the expenditures have occurred.
- Budget amendments must be submitted in EGMS and approved by OSSE. **The final date for submitting FY24 amendments is Nov. 1, 2024.**
- Grantees are required to complete the **budget amendments tab** to clearly outline the shifts made to each budget category and provide the rationale for the changes. Grantees must also make the corresponding changes to the pertinent line items in the **budget tab**.



- **EGMS Tip:** You cannot have an open (created or submitted but not approved) reimbursement request and an open amendment in EGMS at the same time.



Additional Resources

Compliance with Federal Grant Requirements

- As a recipient of federal SOAR funds through OSSE, grantees must follow the [Uniform Grants Guidance \(2 CFR Part 200\)](#). Some of the key requirements include:
 - Maintaining all grant-related documentation for at least five years after the end of the award period, i.e., until Sept. 30, 2029.
 - (2 CFR 200.302(b)(3), 200.333 and 200.335; 34 CFR 76.730)
 - Keeping accurate time and effort records for employees charged to the SOAR grant, in accordance with your LEA's time and effort policy.
 - (2 CFR 200.430(i))

Compliance with Federal Grant Requirements cont'd

- Checking SAM.gov's [Excluded Party List](#) and taking a screenshot with date stamp for every potential vendor (expenditures \geq \$25K) prior to signing contracts and obligating grant funds.
 - (2 CFR 200.213 and 2 CFR Part 180)
- For all equipment (per-unit purchase price \geq \$5,000) and high-value and/or mobile supplies (e.g., laptops and tablets), maintaining a detailed inventory list and following your LEA's policy for annual inventory checks, which should include all federally required components.
 - (2 CFR 200.302(b)(4), 200.313(d)(1), 200.313(d)(2), and 200.313(d)(3))
- OSSE's [FY21 fiscal monitoring indicators](#) can be a useful tool to reference for keeping in compliance with other federal requirements not listed here.

Helpful Resources

- [OSSE's SOAR Formula web page](#) – bookmark this in your web browser for quick access to all FY24-related grant documents.
- [EGMS user manual](#) (updated 2022)
- Experiencing EGMS issues? Grantees should submit an EGMS support ticket directly within [EGMS](#) itself. The link to create ticket is at the top left of every screen in EGMS after logging in.
- LEA Look Forward newsletter (published every Friday) – sign up [here](#)
- Division of Systems and Supports K-12 Grants Newsletter (published bi-weekly on Wednesdays)
 - To sign up, you need to be designated as an “LEA Finance/Grants Manager” in the [IDS All Staff Collection](#), which is where the newsletter distribution list is pulled from. Your LEA’s data manager can facilitate this process.

Chronological Listing of All Key Grant Dates

Date	Activity/Milestone
July 1, 2023	FY24 SOAR Formula Consolidated award period begins
Jan. 31, 2024	First quarterly reimbursement request submission due
April 15, 2024	First semi-annual grant report due
April 30, 2024	Second quarterly reimbursement request submission due
July 31, 2024	Third quarterly reimbursement request submission due
Sept. 30, 2024	FY24 SOAR Formula Consolidated award period ends
Oct. 31, 2024	Fourth quarterly reimbursement request submission due
Nov. 1, 2024	Final date to submit budget amendments
Nov. 15, 2024	Second semi-annual grant report and final narrative report due
Dec. 1, 2024	Final date to submit FY24 reimbursement requests

SOAR Team Contact Information

Point of Contact	Contact Information
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*SOAR program contacts are listed by LEA in the allocations document on [OSSE's SOAR webpage](#)



Q&A
