

State-Aided Institutions (SAI) Program: Kick-off for Fiscal Year 2024

Maryland State Department of Education

June 22, 2023

Presented By | Nicole Obregon, Office of Grants Administration and Compliance



Agenda

- Overview
- Changes from last year
- Timeline
- Reporting Requirements
 - Grant agreement
 - Midyear progress report
 - Invoices
 - Site visits
 - Final reports
- Questions

State-Aided Institutions (SAI) webpage



Overview

- Budget bill for fiscal year 2024 (<u>HB 200, page 159</u>)
- Requirements defined in COMAR <u>13A.05.13.00</u> through <u>13A.05.13.06</u>
- Provide engaging, hands-on, experiential learning opportunities that support the State's curricular and educational goals and priorities
- Free or reduced admission, full-day and residential field trips, mentoring, activities for educators, professional development for teachers
- State-Aided Institutions (SAI) webpage

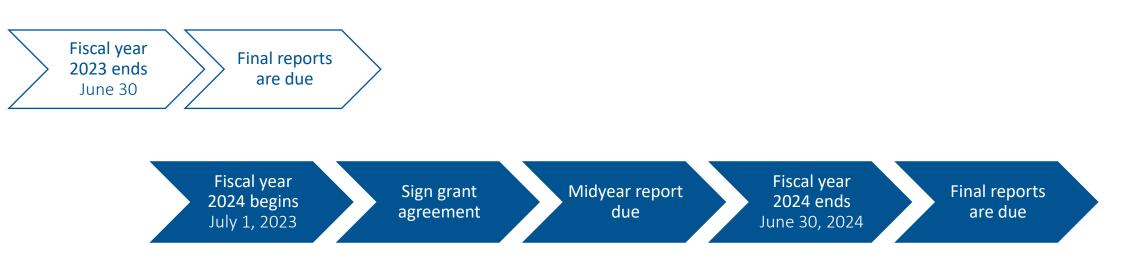


Changes

- Grant agreement, no more rate of reimbursement
- Invoice form is simpler
- Invoice schedule is flexible
- SAIs must still attach supporting documentation to invoices
- Site visits will take place for every SAI
- Site visits will have 2 components: programmatic and fiscal
- Final progress report and MFR report are combined
- Webpage provides forms, templates, and updates









Reporting Requirements

Due	ltem
June – July 2023	Grant agreement is finalized
October 31, 2023	SAIs submit invoices to MSDE for expenses
January 31, 2024	Midyear progress report SAIs submit invoices to MSDE for expenses
April 30, 2024	SAIs submit invoices to MSDE for expenses
Ongoing	Site visits
August 15, 2024	Final reports (final progress report and MFR report) SAIs submit final invoices to MSDE for expenses



Grant Agreement

- An agreement between MSDE and the SAI
- Scope of work performed
- Approved budget
- Invoicing schedule



Midyear Report

- Report template available on the SAI webpage
- Captures progress achieved and grant funds spent at the mid-point of the grant period

MARYLAND STATE DEPARTMENT OF EDUCATION INTERIM PROGRESS REPORT

Grant Name	State-Aided Institutions (SAI) Program, FY 2024	Grant Recipient Name	Institution Name			
MSDE Grant #	123456	Recipient Grant #	123456			
MSDE Project Manager	Nicole Obregon	Recipient Project Manager	Point of Contact			
Fund Source Code		Grant Period	July 1, 202	3 June 30, 2024		
			From	То		
ection I: ATTAC	H ADDITIONAL SHEETS IF NEEDED					
. Explain grant activities that have taken place during the reporting period. What milestones have been met? What nilestones have not been achieved? Have staff been hired according to schedule?						
ecord response here or in an attached word document.						
Are the goals and objectives expected to be achieved by the end of the grant period? Yes No						
ecord response here or in an attached word document.						
Are grant timelines being adhered to? Yes No				No		
f not, explain and discuss the impact on grant outcomes.						
ecord response here or in an attached word document.						

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or

Yes

4. How much of the budget has been expended to date?

If not, what steps are being taken to expend the funds as planned?

5. Is spending consistent with budget projections?

Record response here or in an attached word document.

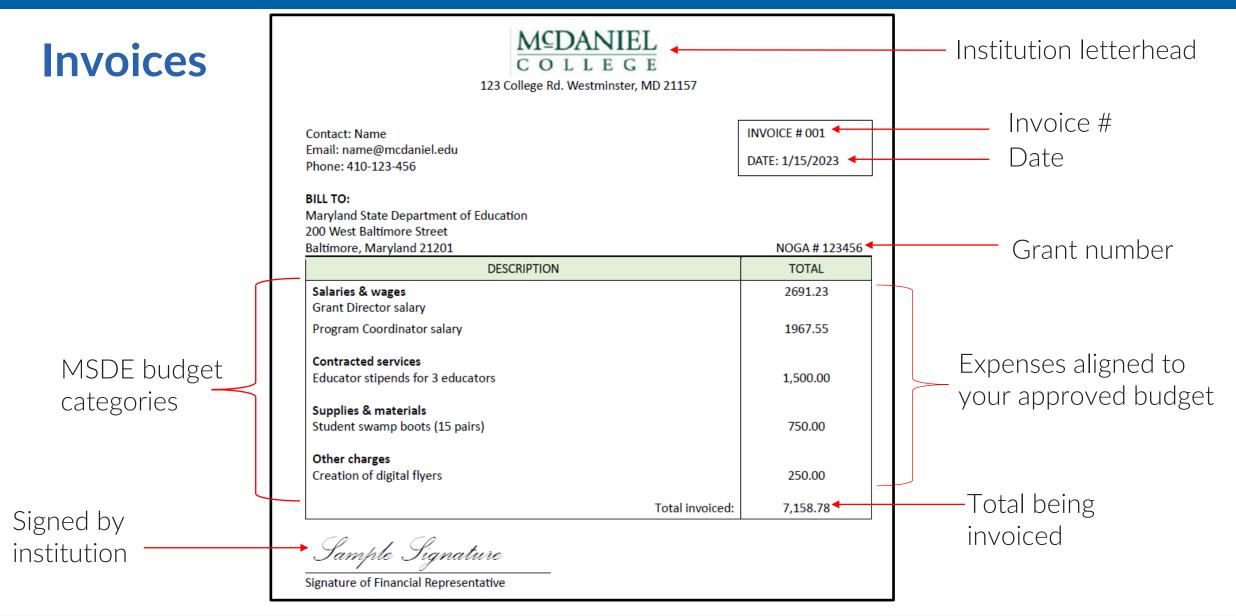
No

Invoice Schedule

- Initial distribution of 25%
- Quarterly reimbursement requests for the remaining 75% of the Institution's funding allocation
- Reimbursement requests must contain: completed invoice, proof of expenditures
- The submission deadlines for these requests are as follows:

Quarter	Reporting Period	Invoice Due to MSDE	
Initial 25%		July 2023	
1	July 1 through September 30, 2023	October 31, 2023	
2	October 1 through December 31, 2023	January 31, 2024	
3	January 1 through March 31, 2024	April 30, 2024	
4	April through June 30, 2024	August 15, 2024	





Site Visits: Programmatic

To be compliant with <u>COMAR 13A.05.13.03 Program Qualifications</u>, MSDE collects responses to the following questions:

- Do the activities align with what's in the approved application?
- Are the students from a Maryland school group?
- Are students and teachers engaged and interested?
- Are staff members present and engaged?
- Is there a clear and equitable registration process for teachers/schools to book an event?



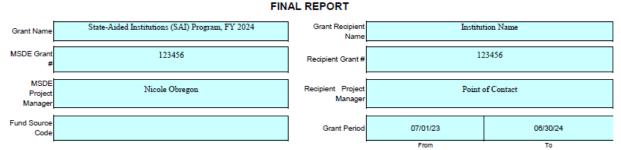
Site Visits: Fiscal

Question	Citation
Do the activities align to the approved budget?	<u>§ 200.403 Allowable costs</u> Maryland Financial Manual (see page 59)
Are employees funded through SAI funds engaged?	<u>§ 200.430 Compensation.</u> <u>Maryland Financial Manual</u> (see page 138 – Direct Costs: 1) Compensation of employees
Is there a clear process for keeping track of expenses?	 § 200.302 Financial management § 200.453 Materials and supplies costs § 200.416 Cost allocation plans Section 5-101(b) of the Education Article
Do you keep evidence on file to substantiate expenses?	<u>§ 200.332 Requirements for pass-through entities</u> <u>§ 200.303 Internal controls</u> <u>Maryland Financial Manual</u> (see page 17 - Accounting and Reporting Requirements
Is there a clear and equitable process for booking reservations for SAI-funded field trips?	§ 200.405 Allocable costs



Final Reports

- Report templates available on the SAI webpage
- Final Progress Report captures year-end achievements and grant funds spent by the end of the grant period
- Managing For Results (MFR) Report captures service numbers and whether goals were met



MARYLAND STATE DEPARTMENT OF EDUCATION

Section I: ATTACH ADDITIONAL SHEETS IF NEEDED

1. Describe in detail how the grant has achieved its goals and objectives. If any were not fully achieved, explain why.

Attach a narrative response in a word document. Attach documentation (spread sheets, tables, etc.) th	at show all aspects of how the scope of v	work has been met.		
2. Have all grant funds been spent or obligated at the end of the grant period?	Yes	No		
3. If the answer to Question #2 is no, please explain any balances.				
If no, record response in word document.				
4. When will the balance be remitted to MSDE?	Date:			
If the balance is not sent to MSDE before the final AFR is filed, the funds must be returned with the AFR.				



Questions?

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