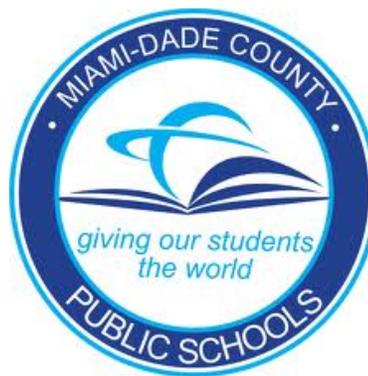


The School Board of Miami-Dade County, FL

Office of Intergovernmental Affairs and Grants Administration

Grants Management Manual



The School Board of Miami-Dade County, Florida

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*Office of Intergovernmental Affairs, Grants Administration,
and Community Engagement*

Miami-Dade County Public Schools

Office of Intergovernmental Affairs and Grants Administration

Mission Statement

The Office of Intergovernmental Affairs and Grants Administration (OIAGA) maximizes federal, state, local and private funding to achieve academic success for all students. Grants Administration works with staff from all areas of the District to facilitate grant submittal and align grant proposals with District priorities. The Department also works with Congress, state officials, and community partners to lead the dissemination and success of the School Board's legislative agenda.

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Introduction

1 INTRODUCTION

Congratulations!

You have been successful in receiving the grant for which you applied and are truly to be commended. **With the award of a grant come many responsibilities.** The Office of Intergovernmental Affairs and Grants Administration (OIAGA) wants you, as the manager of a grant-funded program, to be as successful in implementing your grant as you were in receiving it. To that end, this handbook presents basic information about the implementation of a grant and provides references which should enhance your effectiveness in the daily operation and management of your project. This handbook is your reference source for the grant administration process within Miami-Dade County Public Schools (M-DCPS).

Note: This manual has been updated to reflect the implementation of the Office of Management and Budget new guidance for Federal Awards referred to as the “Uniform Guidance” and codified under the Code of Federal Regulations under 2 CFR 200 titled “Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance).” See the following link: <http://www.ecfr.gov/cgi-bin/retrieveECFR?gp=&SID=2331902184faa3af75eddd011b2028fd&n=pt2.1.200&r=PART&ty=HTML>

SUGGESTION

As you read through this handbook, make notes in the margins, highlight segments that you feel will be useful to you, and write questions beside material that is not clear to you or that you feel you want to pursue further. **Use this handbook as a guide. Read ALL sections; re-read any or all parts if necessary. It is designed to be a working document.** As pertinent information, updates, and memoranda become available, they will be distributed for you to insert in the appropriate section of the handbook.

Role of the Office of Intergovernmental Affairs and Grants Administration (OIAGA)

The role of OIAGA is to serve as the liaison for the School Board, the Superintendent, and project managers in all official business with federal, state, and/or other agencies that provide funds for special projects.

Therefore, even though your school or office may be responsible to another work location (Region Office, Division, Bureau, or Office of M-DCPS) for administrative purposes, OIAGA is required to oversee certain policies, rules, regulations, and protocol that apply to the operation of your grant-funded project.

Staff within OIAGA is responsible for providing assistance in securing supplemental funds and for providing technical assistance in financial monitoring and compliance of grant-funded programs. For the responsibilities pertaining to each unit, please see **Appendix A**. The office maintains information regarding existing and pending legislation and communicates this information to appropriate departments, personnel, and the community. It also provides the technical assistance necessary for the development of grant applications, proposals and grant amendments, as well as for their implementation once funded. The staff is responsible for grant award negotiations, and enforces regulations, policies, and restrictions. In addition, OIAGA guarantees local commitments, submits reports, maintains documents for auditing purposes, and serves as a liaison with various community agencies, non-public schools, universities, and non-profit organizations that may partner with M-DCPS on grant programs.

Responsibilities of Grant Recipients

Grant recipients **ARE RESPONSIBLE** for knowing and conforming to:

- All federal and state legislation, regulations, terms and conditions pertaining to the grant;
- The objectives, activities, outcomes, evaluation plan, and budget specified in the project proposal;
- The program and financial reporting requirements of the funding agency;
- The policies, procedures, regulations, and by-laws of The School Board of Miami-Dade County, Florida; and
- The provisions of all current union contracts in force in M-DCPS.

See **Appendix B**, for a detailed list of the responsibilities of a project manager.

SUGGESTION

Allow ***ample time*** for the completion of all procedures (e.g., personnel hiring, purchase orders, Board Agenda Items, contracts) related to the implementation of your grant. Whatever time you determine to be ample, add a week to it. Why? Many M-DCPS departments are part of the process; because of this, the process can be complex and time-consuming.

Steps to Be Taken Before Implementing Your Project

2. Steps to Be Taken Before Implementing Your Project

Step One – Review Your Proposal

You have been provided with a copy of your project proposal or grant application as approved by the funding agency, the approved budget, a copy of the terms and conditions pertaining to project implementation, and reporting requirements.

SUGGESTION

Keep all grant-related documents and this handbook in a binder.
Study these documents carefully!

When you complete your study, you should be able to answer the following questions:

What population does the project serve?

What administrative and supervisory staff is provided? What qualifications, duties, and/or constraints are specified?

What are the classifications, distribution, and location of other project-funded personnel (e.g., teachers, teacher aides, counselors, clerks)?

How is the project budget distributed? Will funds roll over or should all funds be spent within the project period?

What are the project manager's responsibilities and limits of authority?

What are the formal reporting requirements? What program reports are to be prepared? Reporting due dates?

Who is to prepare them? Who is to receive them?

Is an advisory council required? What are the selection criteria? What is the composition? How many meetings are required?

What constraints are placed on project operations? By whom?

What, if any, parameters are placed on the activities proposed?

What auditing is required? Who is to conduct the audit? When is the audit to be conducted?

What types of documentation must be collected throughout the duration of the project?

Will a proposal for refunding be must submitted? What procedures are involved?

Is the project performance-based? If yes, what are the deliverables? What are the reporting requirements and due dates for deliverables?

What are the requirements and conditions for evaluation?

Is there a required Match?

Are we subcontracting part of the program? If we are, it needs to be clearly stated in the proposal for funding agency's approval. If subcontracting, please refer to page # _____ prior fiscal year audited financial statements.

Some of these questions may be applicable to your project; others may not. **The intent here is to make it clear that the Project Manager is responsible for ALL facets of the project.** In order to facilitate a project successfully, the Project Manager must be thoroughly familiar with the details of the project, with its extent and/limitations, with any governing regulations, and with the proper process for implementing each phase of the project.

SUGGESTION

Ask for help if you need it. Your primary source for assistance and information are the OIAGA staff members assigned to your project. This staff member will provide guidance regarding District policies and procedures and will serve as the liaison in transactions with the funding agency.

Step Two – Familiarize Yourself with Relevant Documents

The reference documents cited below will be of value to you as you plan for implementation and day-to-day project management. If feasible, you may want to obtain a copy of each; if you do not, you should know how to access the document. All documents can be found online.

Board Policies, The School Board of Miami-Dade County, Florida

<http://www.neola.com/miamidade-fl/>

E-Handbooks / Manuals

<http://ehandbooks.dadeschools.net/ehome.asp?Page=Main>

Procedures Manual Procurement Management (Procurement Management)

<http://procurement.dadeschools.net/man/man.pdf>

Payroll Processing Procedures Manual (Payroll Department)

<http://ehandbooks.dadeschools.net/policies/64.pdf>

Manual for Property Control (Office of Accounting)

http://ehandbooks.dadeschools.net/user_guides/71.pdf

Purchasing Card Program Policies and Procedures Manual (Accounts Payable Section)

http://tlc.dadeschools.net/anytimeLearning/Business_Process_Systems/reference_materials/Purchasing%20Card%20Presentation.pdf

Administrative Procedures Manual for Labor Relations and Personnel Management (Personnel Management and Services)

TRVL Electronic Travel Approval Reimbursement System Manual

http://ehandbooks.dadeschools.net/user_guides/30.pdf

Labor Contracts (Office of Labor Relations)

http://www.dadeschools.net/employees/labor_union/all_list.htm

United Teachers of Dade (UTD)

Confidential Exempt Personnel (CEP)

American Federation of State, County, and Municipal Employees (AFSCME)

Dade County School Administrators Association (DCSSA)

Dade County Schools Maintenance Employee Committee (DCSMEC)

Fraternal Order of Police (FOP)

Managerial Exempt Personnel (MEP)

Forms Management (M-DCPS Records and Forms Management)

<http://forms.dadeschools.net/>

FM-7531 Grant-Related Contracts – Document Checklist (**Appendix C**)

FM-7532 Grant-Related Contract Execution – Routing Cheat Sheet (**Appendix C**)

FM-2453 M-DCPS Agreement for Contracted Services (<http://forms.dadeschools.net/webpdf/2453.pdf>)

In addition to referring to these documents, you may want to speak with other Project Managers. Generally, they will be willing to assist you and can prove to be valuable resources. Your OIAGA liaison will be able to suggest individuals that you may contact, but remember that your OIAGA contact person is your primary source for information and help.

Step Three – Familiarize Yourself with Procedures Related to School Board Agenda Items

School Board Approval

School Board Rule 6110, **Grants**, <http://www.neola.com/miamidade-fl/>, requires that all grant awards be approved by The School Board of Miami-Dade County, Florida. A Board item will be submitted to the Board seeking acceptance of grant awards of \$250,000 and above. The Board item will include a description of the funding source, an overview of the program funded by the grant award, a summary of program expenditures, the source and details of any required matching funds, and a detailed description of contracts to be awarded using the grant funds.

A quarterly report listing grant awards under \$250,000 will be transmitted to the Board by the Office of Intergovernmental Affairs and Grants Administration. Schools, Region Centers, and District-level offices shall provide, at a minimum, the funding source, the amount of the grant award, the purpose of the grant-funded program, the length of time the program will be in existence, any required matching funds, and in-kind contributions associated with the grant-funded program.

Before you can establish a budget in the SAP system and before you can access your funds, The School Board must approve your grant award. In addition, some projects may include items (e.g., a contract) that require Board approval. To obtain approval, it is necessary to prepare an Agenda Item to be presented to the School Board. The Board Item is initiated by the Project Manager and sent to the OIAGA contact person who will assist in the approval process. Call your OIAGA liaison; this person is your primary guide in the process of preparing Board Agenda Items. **Each item must be prepared according to a prescribed format, and it is imperative to adhere strictly to all timelines.** Your familiarity with the procedures related to the development of a Board Agenda Item will expedite the process.

Agenda Preparation Meeting

Agenda Items must be reviewed at the Superintendent's Agenda Preparation meeting prior to being presented at various committee meetings. This gives a very short turnaround time for revision should any be needed. All grant Board Items are presented under OIAGA, not the particular department implementing the grant project.

Preparation of Board Agenda Items

Board Items consist of the following required documents (see **Appendix D** for samples):

- Board Item – Completed by OIAGA
- Back-up Information – Complete each section with additional information that is not included in the Board Item; required for Board presentation.
- If the grant requires contracts over \$50,000, they require Board approval and must be included as a highlighted item on the Board Item. Make sure to make the OIAGA Administrator working with you aware that it exists,

Intergovernmental Affairs and Grants Administration provides sample Board Items and required documents on its website at <https://www.dadegetsgrants.net/board-items>.

Board Items Requesting Approval/Renewal of a Contract

School Board Rule 6320 (**Appendix E**), **Purchasing**, <http://www.neola.com/miamidade-fl/>, requires that when contracting for **professional services** as defined by the rule, one of the following Procurement methods be used: (1) Awarded Bids, or (2) Request For Quotes (RFQ). The Policy requires School Board approval for contracted services and purchases in excess of \$50,000 and allows for exceptions that are delineated in the Policy. However subparagraph N. provides for the following exception, “A contract for commodities or contractual services may be awarded without competitive solicitations if State or Federal law, a grant or a State or Federal agency contract prescribes with whom the Board must contract or if the rate of payment is established during the appropriations process.” Therefore, for evaluation services, if a contractor is selected from the approved List of Prequalified Consultants, Pursuant to Request for Proposals No. ITB-15-086-YWP Program Evaluation Consultant Services and is written into the grant application or proposal, a Board Item is not necessary. (**Appendix F**)

School Board Rule 6320 also provides for exceptions from the formal bidding process for professional services defined as sole source, specific expertise, or as otherwise determined by the Professional Services Contract Committee. These School Board Rules are applicable to grant funds and contracts for service that are written into grant applications.

K. The Board may dispense with requirements for competitive solicitations for the emergency purchase of commodities or contractual services when the Superintendent determines in writing that an immediate danger to the public health, safety, or welfare or other substantial loss to the School District requires emergency action. After the Superintendent makes such a written determination, the Board may procure commodities or contractual services necessitated by the immediate danger, without requesting competitive solicitations. However, such an emergency purchase shall be made by obtaining pricing information from at least two (2) prospective vendors, which must be retained in the contract file, unless the Superintendent determines in writing that the time required to obtain pricing information will increase the immediate danger to the public health, safety, or welfare or other substantial loss to the District.

...

L. A contract for commodities or contractual services may be awarded without competitive solicitations if State or Federal law, a grant or a State or Federal agency contract prescribes with whom the Board must contract or if the rate of payment is established during the appropriations process.

...

V. The Professional Services Contract Committee (PSCC) may consider requests for exceptions from competitive bidding. The PSCC shall be comprised of representatives, as stated in the attendee requirements for an evaluation committee. The PSCC may grant exceptions for sole source contracts, contractors having specific expertise, or as otherwise determined by the PSCC to be in the best interest of the Board. The PSCC will be used in extenuating circumstances only. For contracts with an annual estimated cost of more than \$50,000, exceptions recommended by the PSCC must be approved by the Board.

School Board Policy 6110, **Grant Funds**, raises the threshold to \$250,000 for grant awards requiring the submittal to the Board seeking acceptance of grant awards of \$250,000 and above. Please note that grants awarded for less than \$250,000 which include contracted services in the amount of \$50,000 or greater, require Board approval. In addition, the department responsible for the grant award must generate the contract as well as the Board Item. Therefore, **the project manager must process a Board Item to enter into any contracts over \$50,000 which is written into grant awards of \$249,000 or less. OIAGA can take the contract on the same Board Item the grant is approved on if all requirements are met at the time the grant Board Item is prepared and the assigned OIAGA administrator is notified with ample time.**

In addition, the following MUST be followed:

Step 1 – Check to see if the required item is available on the M-DCPS Catalog or the Stores and Mail Distribution (S & MD) Stock Items catalog. These catalogs are available through the Procurement tab on the System Application and Products (SAP) Portal. If so, complete the purchasing through the SAP catalogs.

Step 2 – If the required item is not found on any of the catalogs, identify a minimum of three (3) vendors, one of whom should be a certified Minority – and Women-owned Business Enterprises (M/WBE) vendor and solicit quotes (verbal quotes must be documented). A list of certified M/WBE vendors is available on the Office of Economic Opportunity website: <http://mwbe.dadeschools.net>

Step 3 – The following procurement procedures should be followed:

Procurement by **micro-purchases**. Procurement by micro-purchase is the acquisition of supplies or services, the aggregate **dollar amount of which does not to exceed \$3,000**. (or \$2,000 in the case of acquisition for construction subject to the David-Bacon Act). To the extent practicable, the non-Federal entity must distribute micro-purchases amount qualified suppliers. Micro-purchases may be awarded without soliciting quotations if the non-Federal entity considers the prices to be reasonable.

Procurement by **small purchase** procedures (**\$3,000 to \$150,000**). Small purchase procedures are those relatively simple and informal procurement methods for securing services, supplies, or other property that do not cost more than the Simplified Acquisition Threshold. If small purchase procedures are used, price or rate quotations must be obtained from an adequate number of qualified sources.

Procurement by **sealed bids** (formal advertising) **more than \$150,000**. Bids are publicly solicited and a firm fixed price contract (lump sum or unit price) is awarded to the responsible bidder whose bid, conforming with all the material terms and conditions of the invitation for bids, is the lowest bid.

Procurement by competitive proposals is normally conducted with more than one source submitting and offer, and either a fixed prices or cost reimbursement type of contract awarded.

Procurement by noncompetitive proposals is procurement through solicitation of a proposal form (RFP) from only one source and may be used only when item is available from only a single source and some other circumstances apply as per the Uniform Guidance.

Exclusion to Board Policy 6320

For certain categories of professional services contracts, Board Policy 6320, Section F, provides for exclusion to the rule. **The following exclusion to this rule apply:**

1. Contracts for legal services by the School Board Attorney and attorneys supervised by the School Board Attorney, architects, land surveyors and engineers, non-public school placements and other services/goods for which selection procedures are provided in Florida Statutes, State Board rule, or other Board Policy.

The Board may make further exceptions to this rule on a case-by-case basis.

1. Agenda Items requesting School Board approval/renewal of a contract for which the bidding or request for proposal process was not followed must be submitted to the Professional Services Contracts Committee for approval. The purpose of this committee is to grant or deny exceptions to following the request for proposals or bids process. The committee, subject to the legal requirements of the Sunshine Law, meets only once a month. Originators of Board Items related to contracts need to plan accordingly.

See Section 2.320 of this handbook for information on the Professional Services Contracts committee.

If approval is granted by the Professional Services Contracts Committee for an exception, then the Agenda Item should include a statement indicating this approval. *Example: "The committee established by Board Policy 6320 has reviewed this contractual agreement on _____, **202** and recommended that an exception to the rule regarding bids or Request for Proposal be granted as the contractor has specific expertise in this field."*

Other bases for exceptions may be "sole source" or "as otherwise determined by the committee."

Step Four – Develop Planning Documents

The development of planning documents and the review of other documents will help you to be an effective and an efficient project manager. These are identified and described in this section.

Budget Plan

Look at the budget section in the copy of your project as approved by the funding agency. Review what you proposed in light of the actual dollars you received.

Between the time that you submitted your proposal and the time the grant award was made, changes may have occurred which would impact your budget. **Do not make budget adjustments without seeking this assistance.** Submit the Budget Transfer form which accompanies your grant information packet. A Budget Transfer form in Excel format is available on the OIAGA website at:

<http://grants.dadeschools.net/usefulforms.asp> (**Appendix G: Budget Transfer Form**)

SUGGESTION

Consult with your OIAGA contact before making **any** changes in the budget. Always use the Budget Transfer form provided on the OIAGA website. The Budget Transfer form must be signed by project manager.

Supervision/Implementation Plan

Review your project proposal again. It may contain a sequence of events/activities and/or a timeline that seemed appropriate when you wrote the proposal. As you review it now, considering current conditions, needs, and parameters, the sequence or timeline may be inappropriate or inadequate.

Keep well-documented records and files of **all** phases of your project. Careful record keeping and documentation throughout your project will help you prepare for site visits, audits, and an efficient close-out. Determine exactly what will be required of you to close out your grant, including when reports (financial and programmatic) are due and to whom. Collect pertinent data as you go, and, by keeping up, you will not have to catch up. This will significantly reduce PANIC as you near the end of your project. Make sure to keep very careful records of all grant-related documents, particularly payroll and budget documentation. Grants are monitored and/ or audited on a regular basis and any of these documents could be requested during an audit or monitoring period.

SUGGESTION

In the event that you have been appointed to manage this project after its beginning date, and someone else has performed some activities (e.g., hiring personnel, initiation of requisitions), it is important that you gather and review all pertinent documents as quickly as possible to move forward to make sure all appropriate documentation is being kept and continues to be kept.

Chronological Timeline: The Project Calendar

This type of listing can be extremely useful. In addition to listing events and activities with their deadlines (or due dates), you should also record when you **intend to begin** upcoming activities. By doing this, you will be prepared to meet deadlines, to develop any materials you need to distribute in plenty of time to have them on hand, and to prepare reports ahead of time. Should you need additional information or experience a problem, allowing ample time will enable you to be an efficient manager.

Schedule a meeting with your OIAGA contact to review your supervision/implementation plan. Take with you all other materials you have prepared, such as:

- Your budget plan;
- A request to establish a position for any full-time personnel to be hired;
- Your chronological timeline: the project calendar;
- Drafts of School Board Agenda Items (one for School Board approval of your grant award and one for a contract, if applicable to your grant);
- A list of those segments of your grant and any activities for which you plan to keep files and documentation; and
- Any other material that you feel pertains to the operation of your project.

Having all of your of your material together for this conference will enable your OIAGA contact to be of great assistance to you in coordinating all of the pieces of your project with all of the administrative and time constraint requirements. Your OIAGA contact will make suggestions to you that will help to ensure the success of your project and your success as a project manager.

Step Five – Proceed with Your Project

After you have reviewed your Supervision/Implementation Plan with your OIAGA contact, you are ready to set it in motion.

The remainder of this handbook provides you with information and references that will assist you in the implementation and day-to-day operation of your grant-funded program. The handbook, however, is not all-inclusive. Occasionally, you will need more information than is provided here.

Ask questions; seek help. Do not proceed based on “I think this is what I should do.” Find out the correct procedure. Intergovernmental Affairs and Grants Administration staff is your partner and has an interest in the success of your project.

Implementing Your Project

3 Implementing Your Project

This section will familiarize you with the policies, regulations, and procedures involved in acquiring what you need (e.g., personnel, supplies, equipment, contracted services) to implement your project. In addition, it contains information that you will need to know concerning purchasing, retention of records, forms management, and managing your current budget.

Good organization and careful planning are essential to the successful management of a grant. As a grant manager, you undoubtedly want to devote the bulk of your time and effort to the concept and the content of your grant and not to the administrative details that are required by the funding agency and/or the school system.

Using this handbook and the suggestions contained in it can help you get better organized, save some time on the management aspect, and permit you to be able to devote more time to seeing your program goals and objectives carried out.

It is your responsibility to keep your Office of Intergovernmental Affairs and Grants Administration (OIAGA) contact informed about the progress you are making and about any problems you are encountering.

Budget

It is important to understand every facet of your project, to comply with every rule and regulation, and to meet every deadline; however, one of the most important aspects of your project is managing your resources. It is critical that you monitor your budget carefully and regularly and that you oversee the expenditure of all funds. To monitor your budget and to expend your funds, the OIAGA has many resources available to all program managers. OIAGA's Financial Reporting Unit (FRU) has staff experienced in budgeting, accounting, payroll, and procurement.

Grant Award Letter from Grantor

A grant award is generally sent to M-DCPS by the funding agency; it is used as the basis for the development of the Budget Create and the School Board Item. This budget structure is established by your office in conjunction with OIAGA when your request for funding is submitted. The grant award letter includes details regarding the budget, the amendment process, the interim and final reports, and conditions of the grant. Review this letter carefully; as it contains important information.

If the award notification has been made directly to the project site, contact OIAGA in order to help prepare of the budget create and to manage the project. We are here to assist you!

At this time, it may be a good idea to make an outline of the contents of the grant award letter or to highlight those segments that concern the requirements, the expectations, and the restrictions or parameters of the grantor. Pay particular attention to any regulations regarding the budget. A regulation may relate to transferring funds within your budget. For example, if there is an indication that you may move up to 5% of the funds, do not move more than 5%. Exceeding the allowable amount may cause an audit exception.

Revision of budget and program plans

(a) The approved budget for the Federal award summarizes the financial aspects of the project or program as approved during the Federal award process. It may include either the Federal and/or non-Federal share (see §200.43 Federal share) or only the Federal share, depending upon Federal awarding agency requirements. It must be related to performance for program evaluation purposes whenever appropriate.

(b) Recipients are required to report deviations from budget or project scope or objective, and request prior approvals from Federal awarding agencies for budget and program plan revisions, in accordance with this section.

(c) (1) For non-construction Federal awards, recipients must request prior approvals from Federal awarding agencies for one or more of the following program or budget-related reasons:

- (i) Change in the scope or the objective of the project or program (even if there is no associated budget revision requiring prior written approval)
- (ii) Change in a key person specified in the application or the Federal award.
- (iii) The disengagement from the project for more than three months, or a 25 percent reduction in time devoted to the project, by the approved project director or principal investigator.
- (iv) The inclusion, unless waived by the Federal awarding agency, of costs that require prior approval in accordance with Subpart E—Cost Principles of this part or 45 CFR part 75 Appendix IX, “Principles for Determining Costs Applicable to Research and Development under Awards and Contracts with Hospitals,” or 48 CFR part 31, “Contract Cost Principles and Procedures,” as applicable.
- (v) The transfer of funds budgeted for participant support costs as defined in §200.75 Participant support costs to other categories of expense.
- (vi) Unless described in the application and funded in the approved Federal awards, the subawarding, transferring or contracting out of any work under a Federal award, including fixed amount subawards as described in §200.332 Fixed amount subawards. This provision does not apply to the acquisition of supplies, material, equipment or general support services.
- (vii) Changes in the approved cost-sharing or matching provided by the non-Federal entity.
- (viii) The need arises for additional Federal funds to complete the project.

(2) No other prior approval requirements for specific items may be imposed unless an exception has been approved by OMB. See also §§200.102 Exceptions and 200.407 Prior written approval (prior approval).

For Federal through State Grants/Projects you will also have to comply with section B of FDOE Green Book <http://www.fldoe.org/finance/contracts-grants-procurement/grants-management/project-application-amendment-procedure.stml>

NOTE

No funds received for any grant may be co-mingled or transferred from one program to another.

OIAGA FRU Grant Transmittal Packet

In your grant award package is a completed Grant Transmittal Form. An explanation of each segment of the form is given here and is followed by a sample.

General Information

At the top of the sheet is the following information:

Program Number	M-DCPS SAP program number assigned to your project
Project Manager	M-DCPS person responsible for project implementation

OIAGA contact	Name of the person in OIAGA who is your primary contact for non-financial information and assistance
Project Title	Name of your M-DCPS project
Grant Title	Official name of the grant (from the funding agency)
Grant Award Number	Number the funding agency assigned to your project (if applicable)
Funding Source	Agency which provides the funds for your project
CFDA	Catalog of Federal Domestic Assistance – Assigned number for federal programs
Statute	Law creating the funding for your project (if applicable)
Dates	Length of time of your project; funding period
Grant amount	Amount of funding awarded to your project

Descriptions of the other sections of the sheet follow:

I. Budget Action

The Budget Action indicates the type of project, source of funding, and the attachments included in the Grant Transmittal Packet. The attached Budget Create (**ENTR**) lists how the money is allocated so that you can access it to pay personnel and purchase what you need to implement your project. This categorizing of funds is known as a budget structure. The budget structure that appears on this sheet was based on the budget that was submitted to the funding agency and approved by them. The budget structure consists of the following segments:

FUND	The overall categories into which monies are allocated (e.g., General Operating Fund)
FUNDS CENTER	The number of the work location at which the project is based
COMMITMENT ITEM	The specific object identified for spending (e.g. salaries, fringes, supplies)
FUNDED PROGRAM	Used only for construction project numbers. Use NR unless otherwise informed.
FUNCTIONAL AREA	Combination of the program number and function code: e.g. 49190000-510000 . The PROGRAM NUMBER is the 8 digit number assigned by Contracted Programs Accounting. The FUNCTION is the 6-digit number that denotes the area in which the money is used (e.g., Basic Instruction K-3, Instructional Staff Planning)

If allowed by the funding agency, **indirect costs** are charged to the project budget. These costs, applicable only to federal and federal through state grants, are charged to the project by M-DCPS to cover administrative expenses. The rate is determined on an annual basis and is approved by the State of Florida. The Indirect Cost is listed as a separate line item budget (Funds Center 1990400, Commitment Item 579200, Function 720000). Project managers do not have access to indirect cost amounts. For updated Indirect Cost Rates, please visit OIAGA's Useful Forms webpage at <http://grants.dadeschools.net/usefulforms.asp> and see the most up to date **Fringe Calculator** worksheet.

At this time, review the budget that was approved by the grantor; compare it with the budget on the OIAGA Grant Award Information Sheet. If there any discrepancies, please notify the OIAGA Financial Reporting Unit (FRU) immediately. Other attachments include the grant award letter, approved budget, Board Item, and additional information as appropriate.

II. Procedures Section of Grant Transmittal Form

Number 1 - indicates the date by which all funds must be expended and the date by which all requisitions must be submitted. The timeframe between a requisition and payment is approximately three (3) months.

Number 2 - indicates the approval chain for your shopping carts. These people must approve your shopping cart or fund reservation after the person at your worksite authorized to do this enters it into the system. The user ID's indicated here by cost factor must follow the usual approval chain required on shopping carts for your work location. The Approval Chain Memorandum is available on the OIAGA website at: <https://www.dadegetsgrants.net/financial-reporting-tools>

Number 3 provides information to transfer funds within the grant budget.

Funds may be transferred within the budget if needed, BUT ONLY if the grantor permits it and ONLY TO THE EXTENT authorized by the grantor. (This was discussed in 3.11 Grant Award Letter from Grantor.)

To transfer funds from one object to another within your program, complete the Budget Transfer form and submit it to the OIAGA Financial Reporting Unit. **Appendix G** contains a sample of this form. A Budget Transfer form in Excel format is available on the OIAGA website at:

<https://www.dadegetsgrants.net/financial-reporting-tools>

III. Reporting Requirements

It is the responsibility of all project managers to **maintain records and/or other evidence of the achievement of project objectives**. Your OIAGA contact will guide you in the preparation of your performance report. Each type of grant will require its own set of guidelines for content, format, and frequency of submission. Deadlines are indicated in these sections.

Financial Reporting Tools

It is important for you to maintain accurate records so that your budget balances are in accord with those that are recorded in the General Ledger. All grants require that an official budget report be prepared, signed, and submitted to the funder by Contracted Programs Accounting.

For foundations/corporation grants, the budget report may be required to be submitted as part of the performance report. In this case, your OIAGA contact will guide you. Refer to **Section III** of your Grant Transmittal Form for deadlines.

- **Grants Availability Report (GAR)**

The Grants Availability Report is available through the SAP financial reporting system under grants. The report displays the budget, encumbrances, expenditures, and available balance for your project for the current fiscal year as of the date the report is being run. A sample of the report and a description of the items listed on the report can be found in **Appendix H**. Please contact the OIAGA person assigned to the grant to address questions that you might have regarding your grant budget. Access to download the GAR is given by your Quad A Administrator.

- **Cliff Report**

This report displays the complete budget and status of your project funds from the date of inception. The project manager can obtain the Cliff Report by contacting her FRU contact. Contact information is in **Appendix I**.

- **Financial Projections**

FRU unit prepares and sends **Budget vs. Actual** financial projections for each program every month. In addition to including all actual expenditures and pending purchases, the projection includes expected salary expenditures for the fiscal year based on current fulltime employees. This is a great tool to assist in planning how to optimize your project resources.

A minus (-) figure in the AVAILABLE BALANCE column indicates that you will need to complete and process a Budget Transfer form – if allowed. **BEFORE** you allow a negative amount / overspent an object line, be certain that your grant permits you to do this. Although addressed in the PURCHASING section (3.3), the need to allow for shipping, handling, and higher prices must be mentioned here. Making such allowances will prevent over-expenditures in non-salary objects. Negatives in projected salary objects require prompt attentions since this might require personnel adjustments or a request for amendment to the grant program.

A large AVAILABLE BALANCE at the beginning of your project is normal; when you are about halfway through the grant period, you should have spent and/or committed between one half and three-fourths of your funds; when about three-fourths of the time has elapsed, you should have spent or committed all of your funds.

- **Position Control List**

Under Human Resources in SPA you can access the Position Control List (PCL). The report lists occupied, vacant and obsolete positions by location. **Appendix J**

If your appointment as project manager came after the program budget was developed, you should schedule a meeting with your OIAGA FRU contact to review the budget in order to understand how it was developed and why certain designations were used.

Amendments to the Grant

If a budgetary or a programmatic amendment can be requested (this will be indicated in the grant award letter from the grantor), the amendment request **must** be submitted to OIAGA. For example, if your project was delayed and you need to extend the grant period to complete the activities or if you need an object code that is not in your approved budget, you must request permission to amend your project.

State or federal through state grant amendments must be submitted on Form DOE 150 (**Appendix K**) from the State the State of Florida Department of Education. You will also need DOE form 151 (**Appendix K**) if requesting budget changes.

All amendment requests need to be submitted to your OIAGA Contact for processing. Grants from other sources vary in their procedures for requesting an amendment. Please consult your OIAGA contact for specifics. These forms are available on the OIAGA website at <http://grants.dadeschools.net/usefulforms.asp>.

Hiring of Grant- Funded Personnel

The selection of employees for a particular location (assignment) is the responsibility of the site administrator. All procedures used for employment, assignment, reassignment, transfer, layoff, and recall of personnel must conform to current Miami-Dade County Public School Board policies and regulations. **Under no circumstances** should any person be employed prior to obtaining assurance from the Office of Personnel Management and Services that the person has met all of the requirements for employment and has been approved by the appropriate individual(s). For more information, please refer to the Office of Human Resources.

Full-Time and Part-Time

All requests to establish grant funded positions must be authorized by the Grants Administration Office or by the Title I (T-I) Office for Title I (T-I) grant funded positions, **in order to ensure that positions are in agreement with the grant approved budget and reconciled with existing grant positions.** The request is then send to Budget Management to create the structures in the payroll table and which then send the request To the HR department so that a Position Authorization Control (PAC) position number may be established. Should you need to advertise any of the positions, contact the Office of Personnel Management and Services for instructions. The search for individuals who meet project qualifications, who are able to perform the duties specified, who understand the project goals, and who give evidence of working cooperatively with others may be time-consuming, but searching for the right individual(s) will pay a large dividend. At the school site, consult with the administration for the proper interview and hiring procedures to follow.

Consult with the individual in your school or office who has authorized to hire. To activate the employment of the personnel you have selected, the **Request for Personnel Action (RPA)** must be completed through the electronic hiring system.

Before a person can be hired full-time, a position must exist in Budget. When you discuss the budget with your OIAGA contact, be certain to request that such a position be established. The PAC will then appear on the Position Control List. You will need to supply your contact person with the appropriate Job Code and the title so that a PAC can be opened. Then the PAC will be available when you are ready hire the person.

Pay rates must be consistent with M-DCPS policies. All employees are required to sign in on the official M-DCPS site daily payroll attendance sheet. Should your grant require a separate sign-in form, please work with your OIAGA staff contacts to develop one. A sample can be found in **Appendix L.**

SUGGESTION

Be sure that project employees are signing in under the correct personnel assignment ID connected to your particular grant.

REMINDERS:

Regular teachers employed on an hourly basis can work ONLY during times that are not part of their regular workday hours (i.e., before/after school hours and weekends).

Stipends

Full-time certified employees who attend district-approved in-service education programs at a time other than the regular workday hours shall be compensated at a daily rate stipulated by the UTD contract.

Payroll

Part of your responsibility as a project manager is to be certain that all payroll procedures are followed. Those are described in the Payroll Processing Procedures.

To be sure that employees are paid on time, it is imperative that the time sheet is (1) verified and signed by the employee and by the administrator or the designated person in charge and (2) accurately entered on the **SAP Payroll System** no later than the date indicated in the Payroll Processing Schedule.

Position Control List (PCL)

Under Human Resources in SAP you can access the PCL. The report lists occupied, vacant and obsolete positions by location. Reconcile the positions authorized in your program against the positions listed in the PCL under grant positions. If discrepancies are noted, please notify your OIAGA FRU contact staff. Allow reasonable time for the update and check the PCL list to ascertain that changes requested were made.

Payroll Expenditures Verification

The **SAP Payroll Certification report** lists employees' names, gross pay and fringe benefits associated with those payments. The **SAP Payroll Distribution report** lists also employees' names, number of days/hours worked and gross pay. Please verify the accuracy of the information in those reports. If there any discrepancies, make sure that a payroll correction is done as soon as possible. **(Appendix M)**

SUGGESTION

Make notes any time you speak with someone about any phase of your grant. Include the date, the time, the phone number, the name of the person(s) with whom you spoke, and the information you were given. Keep these notes for reference and as part of your documentation.

Time and Effort Report Certifications

The School Board of Miami-Dade County Public Schools has a substitute system approved by our cognizant agency, the Florida Department of Education.

Time and Effort certifications are a federally mandated certification for all personnel paid in full or partially from federal, federal through state or federal through local funds. If any salary or any part of a salary is paid from federal grant funds, all activities and the number of hours (time-on-desk) devoted to those activities must be documented. The Time and Effort certifications are generated through the SAP system three times each year covering a four months period through the fiscal year: July 1 to October 31, November 1 to February 28, and March 1 to June 30. **(Appendix N)** The worksite administrator must certify the accuracy of this documentation via the link in their Universal Work List on the SAP system. The Certifications need to be approved by the administrator having firsthand knowledge of the work performed. **The approval of the time and effort cannot**

be delegated to a non-administrator or to a site administrator not having payroll approval role (This particular requirement does not apply to private sector grants. They may, however, have similar requirements to justify expenditures.) Since this report is maintained electronically, no paper report is generated. However, an Excel spreadsheet version of the electronic report can be generated if requested. Contact your FRU OIAGA staff member assigned to request the report.

Manual Time and Effort Payroll Certification Report

Certain transactions such as a transfer of expenditures of salaries for Federal programs require a manual Time and Effort Report Payroll Certification. Your FRU OIAGA staff contact will provide you with the form. It is to be signed and returned to OIAGA in order to complete the transaction.

Purchasing

When ordering goods, **REMEMBER** that prices fluctuate, including shipping and handling costs. **Monitor** these **fluctuations** through the Grants Availability Report and adjust your budget accordingly to avoid over-expenditures of budget.

Miami-Dade County Public Schools buys certain items in bulk through a bidding process and thus obtains a better price. Work with the person at your site who has responsibility for purchasing. Also work with the buyer in charge of the commodity and/services you are buying. That individual can give you valuable advice about what item to purchase from which vendor. For a staff listing of Procurement Department Buyers and their purchasing assignment, please visit <http://procurement.dadeschools.net/contact.asp>.

Federal funded grants and projects:

Must comply with the Code of Federal Register (CFR) section **Title 2 Part 200 Section E Cost Principles**

<http://www.ecfr.gov/cgi-bin/retrieveECFR?gp=&SID=2331902184faa3af75eddd011b2028fd&n=pt2.1.200&r=PART&ty=HTML>

Allowability of cost criteria

Except where otherwise authorized by statute, costs must meet the following general criteria in order to be allowable under Federal awards:

- A) Be necessary, reasonable, and allocable;
- B) Conform to limitations or exclusions set in the principles or the Federal award;
- C) Be consistent with policies and procedures that apply to both federal and non-Federal funds.

Reasonable Costs: 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

Allocable Costs: A cost is allocable to a particular Federal award or other cost objective if the goods or services involved are chargeable or assignable to that Federal award or cost objective in accordance with relative benefits received.

When is advertising allowable:

Allowable for programmatic purposes including:

- Recruitment
- Procurement of goods
- Disposal of materials
- Program outreach
- Public relations (in limited circumstances)
- Exercise care as “promotional items” are prohibited under state law unless specifically authorized by
 - Statute

The following are not allowable:

- Alcohol
- Entertainment
- Fines and Penalties
- Lobbying
- Advertisement that promotes the organization
- Religious worship, instruction, or proselytization
- Construction, remodeling, repair, operation, or maintenance of religious facility
- Unless specifically authorized, acquisition of real property or construction
- Purchase of goods and services to be used after the end of the project period

NOTE

Goods purchased with grant funds are to be used solely to implement the goals and objectives of the grant.

The SAP Budget/Finance/Purchasing System

The SAP Budget/Finance/Purchasing System is an integrated computerized system, which automates the financial/procurement process of Miami-Dade County Public Schools. Utilizing the online computer network, all work locations of the district are linked with the various offices, divisions, and departments of the Office of Financial Affairs. Budget allocations are established and maintained, shopping carts/fund reservations are created and routed for approval, purchase orders are generated, receipt or return of goods transactions are processed, and invoices are paid.

The SAP Budget/Finance/Purchasing System automates administrative work and reduces the paperwork generated by requisitions, change orders, requests for quotations, purchase orders, and receiving. It reduces the dependence on paper, yet efficiently documents the entire procurement function.

The SAP Budget/Finance Purchasing System is an interactive, real-time system that performs the following functions:

- Provides up-to-the-second information on all purchasing activity; allows immediate response to changes in prices;
- Checks the availability of funds at the time a requisition is entered;
- Provides automated requisition approval;
- Allows tracking the status of a Shopping Cart at every step, Purchase Order, receipt, Invoice, and payment; and provides historical information at the category/item-level for management reporting and analysis.

This manual serves two purposes. For new users, it is a **step-by-step guide**; for experienced users, it is a **reference** tool. For you, as a project manager, it is a source of detailed information should you wish to understand the intricate workings of the system. Most of the information project managers need to know has been excerpted and included in this handbook, which also can be accessed online at www.dadeschools.net/ehandbook/index.htm. Remember, the person at your worksite has the authorization to access the system will input the information for you.

Available Funds Inquiry

You must be sure that sufficient funds are available **before** inputting a requisition for processing. CHAPTER 2 of this manual provides more detail on how to access the **Grants Availability Report (GAR)** Refer to the **manual for SAP Budget Finance Purchasing System**.

Initiating Shopping Carts

Instructions for the creation of shopping carts and/or fund reservations can be found at <https://collaborationportal.dadeschools.net/departments/9410/training/erpwu/FT/default.aspx>

Tips to expedite the approval of Shopping Carts and/or Fund Reservations:

- Check the GAR to make sure that enough funds are available before beginning a procurement function.
- Upload copies of quotes, contracts, sole source letters, board agenda items or any other support documentation to each Shopping Cart or Fund Reservation.
- Make sure that the correct funding structure is being used before sending the carts/fund reservations for approval.
- Create individual lines for contracted services that require a schedule of payments to facilitate payments by Accounts Payable.

NOTE

Object 5510 is the default Object number on the SAP system for Shopping Carts. Make sure to check the Object numbers before finalizing Shopping Carts to avoid delays in payment when goods are received.

Special Shopping Carts

The following contains specific procedures for initiating distinct types of Shopping Carts and describes special circumstances that may be associated with requisitions. Of particular interest to project managers may be the following:

- “No Substitute” Items – There may be instances when goods or equipment must be ordered for which there can be no substitution; for example, may be only one piece of equipment which I interface with the existing equipment. To order items with a “No Substitute” condition, special approval must be requested by using FM-0469 Rev. (02-91). Procedures Procurement Management. “Request for Approval of ‘No Substitute’ Purchase Specification,” which is available online at <http://forms.dadeschools.net>. Additional information can be obtained in Procedure 12-2,
- Annual Periodical – Magazine subscriptions to the current authorized vendor are accepted for no more than one year;
- Non-State Adopted Textbooks – Use a current catalog or call the vendor to ensure correct pricing;
- Federal/State Funded Orders – A special code, **FED** (for federal fund usage), or STA (for state fund usage), must be placed in the first four (4) positions of the item Description in line 0001 only;
- Media Programs – Grant Funds – A special code, **MED** (for Grant fund usage), must be placed in the first four (4) positions of the item Description in the line 0001 only and;

- Cost Supplement Shopping Cart - Whenever a Shopping Cart total must be increased by 10%, review the shopping cart and, if increase is acceptable, change the price(s) and rerouted for approval. If the price increase is unacceptable or no funds are available, reduce the quantities, change prices.

General Authorization (GA) Purchases and Internal Fund Purchases

- The **Procurement Management Services Procedures Manual** (http://procurement.dadeschools.net/PDF/procurement_procedure_manual.pdf) contains specific procedures for initiating two district types of purchases: General Authorization Requisitions. For Internal Funds purchases please refer to the Manual to the Internal Fund Accounting www.dadeschools.net/ehandbook/index.htm
As a project manager, you will input General Authorization Purchases only.
- Information concerning Professional Services Contracts is also included in this chapter and should be reviewed if you plan to enter into any contracts. Refer to the Procurement Management Services Procedures Manual.

Receipts and Returns

- As soon as you receive goods, take the enclosed packing slip to the person at your worksite who works with purchasing. Keep a copy for your records. If a shipment is damaged or unacceptable for any reason, notify the purchasing individual at your worksite. Provide whatever assistance is required. You may be asked to provide information should a **Discrepancy Report** need to be prepared.

YTD Allotment – commitments – encumbrances – expenditures = available balance

An example follows:

YTD Allotment (Annual Budget)\$500

- - Commitment-100
- - Encumbrances-100
- - Expenditures-100
- = AVAILABLE BALANCE \$200

- **“Open PO List”** This report shows all open Purchase Orders for a work location. Identify those that are yours and verify the information against your records. OIAGA staff will also forward the list to you for your grant program.

The person at your worksite who handles purchases will be able to help you read and understand these reports and will tell you how you can be of assistance.

Professional Services Contracts

If the project budget contains funds for purchased services such as for a consultant or for a rental (Objects 5310, 5360, and 5390), it is necessary to enter into a contractual agreement for the services specified in the project proposal. Your OIAGA contact will help you prepare the contract. **Under no circumstances** should you allow a service to **begin prior** to the **approval** of a contract.

You must submit all contracts to OIAGA for approval and processing. M-DCPS has specific procedures for the development and processing of contracts. **It is imperative** that you become thoroughly familiar with the

procedures, that you are aware of all time constraints, and that you adhere strictly to all procedures and timelines. Failure to allow sufficient time to process your request for a purchased service or failure to adhere to all procedures may mean that you will not receive the service you need.

For Subrecipient contracts: It must comply with Section 200.331- Requirements for pass-through entities, see link below, and it needs to be clearly identified in the program proposal and approved by funding agency.

<http://www.ecfr.gov/cgi-bin/retrieveECFR?gp=&SID=2331902184faa3af75eddd011b2028fd&n=pt2.1.200&r=PART&ty=HTML>

SUGGESTION

Include all dates and activities related to contracts in your Supervision/Implementation Plan. In fact, prepare working drafts of your contracts and take them with you when you meet with your OIAGA contact to review your Supervision/Implementation Plan.

The time required to process contracts is extensive:

- Send (Mail Code #9616, SBAB Room #760) or deliver the contract a minimum of three (3) weeks **before** the starting date of the requested service; and
- Allow seven (7) weeks **before** the starting date of the service if the amount is \$10,000 or more. (Such contracts require School Board Approval.)

School Board 6320, Professional Services Contracts; Board Policies are available online at <http://www.neola.com/miamidade-fl/>

Also, refer to the **Procurement Management Procedures Manual**.

- Definition and Requirements
- Procedure for Professional Services Contracts of \$10,000 or less
- Procedure for Professional Services Contracts in Excess of \$10,000 Procedure for Partial Payment for Professional Services
- Procedure for Complete Payment for Professional Services
- Instructions for Preparing the "Transmittal For Agreement Form for Contracted Services"
- "TRANSMITTAL FOR AGREEMENT FORM FOR CONTRACTED SERVICES"
- Instructions for Preparing the "Agreement Form for Contracted Services"
- "AGREEMENT FORM FOR CONTRACTED SERVICES"
- Instructions for Preparing the Payment Request for Contract Services
- "PAYMENT REQUEST FOR CONTRACTED SERVICES"

After the contract forms have been approved, processed, and returned to you:

- Obtain the contractor's signature on the Agreement prior to the starting date; and
- Obtain the contractor's signature on the Request for Payment form when services are satisfactorily completed. The originator will then sign in two places on the same form and will submit the form to Accounts Payable with all originals; or,
- If Partial payment is to be made, follow the same except that you will need to submit two copies of the requisition with the amount changed. The original requisition is to be sent when the final payment or full payment is requested.

NOTE

The dates, the dollar amount, and any service commitments, which appear on contracts, request for payment forms, etc., must **not** be changed.

Approval by the Board Attorney

All contracts must be approved by the Board Attorney. More time must be allowed for any contracts that do not use the standard Miami-Dade County Public Schools forms. OIAGA will forward all contracts to the Board Attorney for review.

Professional Services Contracts Committee

Board Policy 6320, Professional Services Contracts Committee (<http://www.neola.com/miamidade-fl/>) establishes the Professional Services Contracts Committee, which is charged with the responsibility of reviewing and considering requests for exceptions to the rule. The exceptions can be considered based only on the three areas authorized by rule:

1. **Sole Source** - The services are exclusively available from the specific company, institution, or individual.
2. **Specific Expertise** - The company, institution, or individual possesses unique and specific expertise that cannot be contracted from other sources.
3. **As otherwise determined by the committee** - It is within the best interest of the school system to contract with the specific company, institution, or individual.

It is the responsibility of the originator of the proposed contract to identify the area under which the Professional Services Contract committee should consider the request for waiver. In addition, the originator needs to prepare a memorandum with detailed information to the committee. **It is the responsibility of the originator to present a clear rationale for providing a waiver to Board Policy 6320** (<http://www.neola.com/miamidade-fl/>) Your OIAGA contact can also assist you as needed.

The meeting of the Professional Services Contracts Committee is subject to the Sunshine Law. Accordingly, due public notice is required for all meetings of the committee. In each instance when the committee meets to take official action, reasonable notice must be given which will enable members of the public to attend the meeting.

All administrators/departments requiring action by the committee are requested to have their items placed on the agenda at such time and in such manner as established by the chairperson of the committee. Consult your OIAGA contact for the meeting calendar.

NOTE

If you have a contract requiring bids or if you are using the request for proposals process, then there is no need for your contract to be reviewed by this committee.

Travel/Field Trips and Transportation

Your grant may include opportunities for you and/or someone else who is part of your project to travel to a conference, to a convention, and/or to another school. Perhaps the implementation of your grant requires participation in field trips.

Travel Guidelines

If any travel is performed, it is necessary to adhere to provisions of Board Policies 6550; this rule established the guidelines for in-county and out-of-county travel. Board Policies are available online at <http://www.dadeschools.net/schoolboard/rules/>. All M-DCPS Travel Policies and Procedures must be adhered to. The **M-DCPS Travel Policies & Procedures Manual** published by the Payroll Office can be found at <http://ehandbooks.dadeschools.net/policies/100.pdf>.

In-County Travel

In addition to local requirements, guidelines from the Bureau of the Comptroller, Florida Department of Education, state that the base of operations for in-county travel purposes can only be changed if the employee is actually reassigned to a new work location. Temporary assignments (regardless of the length of time) cannot change an employee base of operations for in-county travel computations.

Only the mileage traveled during the work day that exceeds the commuting mileage between the employee's home and his/her permanent base of operations can be claimed (i.e., compensated).

For example:

Miles traveled during workday=50

From home to base of operation=20 (Round-trip miles)

Claimable miles=30

Out-of-County Travel

The appropriateness of all proposed out-of-county travel is judged according to its relevance to the employee's assignment within the grant. Documentation of the appropriateness of proposed travel must accompany each request submitted as well as other supportive evidence such as written invitations to participate and program agendas. Request for out-of-county travel should be kept to a minimum.

Travel Expense Request

The Electronic Travel Approval Reimbursement System can be accessed to process travel expense reimbursements. The **TRVL Electronic Travel Approval Reimbursement System manual** published by the Office of Accounting – Payroll Department can be accessed at http://ehandbooks.dadeschools.net/user_guides/30.pdf.

After receiving approval for the travel from the administrator to whom you report, assist in whatever way you can the person at your site who inputs the travel.

Additionally, only those travel requests which reflect Miami-Dade County Public Schools priorities and have a direct impact on the instructional program will be approved, regardless of the source of funding.

Field Trips

The use of school buses is limited by law to providing services only for those activities that are part of the educational programs of the Miami-Dade County Public Schools. See Board Policy 2340 Field Trips.

In addition, transportation may be arranged through an outside vendor. For a list of approved transportation companies, please visit the Office of **Procurement Management Services** online at http://procurement.dadeschools.net/field_trips.asp.

Furniture, Fixtures, and Equipment

Only the equipment specified in your project may be purchased with project funds. Should you find that you need a particular piece of equipment that is not specified in your proposal or that is not available from some other source, you will need to prepare rationale for the purchase of the equipment. This can be a rather complex and lengthy procedure since it may require approval from OIAGA **and** from your funding agency. Under no circumstances should you obtain this equipment **on any basis** prior to the approval. (NOTE: the purchase of equipment may not be allowed for some projects.) You should research the regulations governing your project to determine what constraints, if any, apply.

You must **prepare and maintain an up-to-date inventory** of all equipment used by your project. Refer to the **manual from the Office of Accounting – Property Control** to determine your responsibilities and the procedures to be followed with regard to all equipment transactions, including the lending and the transferring of assigned equipment. M-DCPS buys many items in bulk and gets discounted rates. Items purchased in bulk include furniture, fixtures, audio-visual equipment, and computer hardware and software.

http://ehandbooks.dadeschools.net/user_guides/71.pdf

Cost Sharing/Match

Cost sharing or matching means the portion of project costs not paid by Federal funds (unless otherwise authorized by Federal statute).

Voluntary committed cost sharing means cost sharing specifically pledged on a voluntary basis in the proposal's budget or the Federal award on the part of the non-Federal entity and that becomes a binding requirement of Federal award.

Third-party in-kind contributions means the value of non-cash contributions (i.e., property or services) that—

- (a) Benefit a federally assisted project or program; and
- (b) Are contributed by non-Federal third parties, without charge, to a non-Federal entity under a Federal award

Program managers need to submit a schedule detailing the breakdown and calculations for match being claimed. In addition the program manager is responsible for keeping supporting documentation for the cost claimed, like payroll certifications and invoices.

Criteria for Cost Sharing/Match-Must comply with Title2-Part 200 section 200.306

- 1) Are verifiable from the non-Federal entity's records;
- 2) Are not included as contributions for any other Federal award;
- 3) Are necessary and reasonable for accomplishment of project or program objectives;
- 4) Are allowable under Subpart E—Cost Principles of this part;
- 5) Are not paid by the Federal Government under another Federal award, except where the Federal statute authorizing a program specifically provides that Federal funds made available for such program can be applied to matching or cost sharing requirements of other Federal programs;
- 6) Are provided for in the approved budget when required by the Federal awarding agency; and
- 7) Conform to other provisions of this part, as applicable.
- 8) Unrecovered indirect costs, including indirect costs on cost sharing or matching may be included as part of cost sharing or matching only with the prior approval of the Federal awarding agency.

Use of Procurement Credit Card

The procurement Credit Card is used for small purchases of items that are permissible under entitlement grants guidelines (Title I, Title II, Title III and IDEA). If you plan to use this cost-effective way to purchase items, you must adhere to the procedures described in the District purchasing card manual. All purchases for less than \$1,000 must be made with the procurement credit card except for items in the shopping cart or those items not allowed by the **Procurement Card manual**. Consult with your OIAGA FRU contact if you are not clear about your responsibilities for attending training and/or authorized purchases.

Culminating Activities

Culminating Activities

Closing Out the Project

You already know the date that your project will end. At the beginning, as you are preparing your Supervision/Implementation Plan, you will need to include this date and to determine as well the exact dates for the termination of all phases of your project. For example:

- What is the last date for submitting requisitions?
- What is the last date for paying all invoices?
- What is the date for the last payroll roster?
- What is the date for submitting the final program report?

Whatever these dates are, give yourself an extra two weeks to meet the deadlines. It is better to close out early than to have a problem arise that will prevent you from fulfilling your obligations before the termination date.

As you gather data throughout the time span of your grant, be certain that it is accurate and complete. Ask yourself, "How would an auditor view the accuracy and the completeness of the data?"

SUGGESTION

Allow yourself ample time to prepare the evaluation materials. Preplanning and frequent monitoring throughout the time span of the project and through documentation conducted on an ongoing basis you should be provided with ample and accurate information to use to prepare the final report.

What should be documented? **Everything!** As you collect material to document the various segments of your grant, ask yourself, "Would an auditor determine that the documentation was comprehensive?" **You are accountable for the correctness and completeness of all records maintained in connection with your project and as required by the funding agency and State laws and regulations.** An audit of your project, depending on the origin of the funds, may be conducted by one source or by more than one source.

The grant itself will specify what activities are to be conducted as part of an audit. These might include, but are not limited to, the following:

- a. Data collection;
- b. Evaluation;
- c. Interim report(s) (financial and/or programmatic); and
- d. Final report (financial and/or programmatic).

SUGGESTION

Never rely on another grant recipient to tell you what is required for your particular grant. Requirements vary from one funding source to another - even those that may come from a common source. Other grant recipients can be helpful in sharing their experiences and in suggesting types of documentation to gather, it but the final responsibility for adhering to the guidelines and parameter of your grant is YOU.

If you have questions, consult this handbook. If the proper procedure still is not clear to you, call your OIAGA contact person.

Developing a Refunding/ Continuation Proposal

To Re-apply or Not to Re-apply? That is the question!

After your project has begun and you have seen how it is progressing at the mid-point of the project period, ask yourself if services are necessary or beneficial beyond the time designated in your current grant. Does the current funding agency offer this as an option?

Is there a deadline for indicating your interest in re-applying? What steps must you follow to re-apply? Your OIAGA contact will assist you in making a decision and in preparing a re-funding or continuation proposal.

In order to be re-funded, you may need to collect supporting data, conduct a needs assessment, supply evaluation data, garner community support, and/or engage in some other time-consuming activities. By including these activities in your Supervision Implementation Plan, you will be able to complete them along with the activities related to your current project.

Review and approval of your re-funding/continuation proposal is required at several administrative levels. This process involves a considerable amount of time. At various stages, changes to your proposal may need to be made.

What if the agency that originally funded your project does not offer the possibility of re-funding? If you feel that you have an excellent project and that during its implementation there is evidence that it is meeting its stated goals and objectives, you may want to research other funding sources. The OIAGA Grant Development Unit has software to research specific funding source based on the focus of the project services and outcomes.

It is the sincere hope of everyone in the Office of Intergovernmental Affairs and Grants Administration that your experience as a Project Manager has been a positive one, that you have grown professionally as a result, that those involved in your project have benefited, and that your future experiences in the educational milieu will be rewarding to you and to those with whom you come in contact.

Thank you for all of your efforts in connection with your grant!

Appendices

**Office of Intergovernmental Affairs and Grants Administration
Unit Responsibilities**

Office of Intergovernmental Affairs and Grants Administration (OIAGA) staff assists District, Regional Centers and school-site personnel to secure, and manage external funding designed to enhance the educational experience for students. In order to accomplish this, OIAGA offers a myriad of services in grants development and financial monitoring. OIAGA has been strategically divided into two units: Grants Development Unit (GDU) and Financial Reporting Unit (FRU). The following services have been identified for each unit:

Grants Development Unit (GDU)	Financial Reporting Unit (FRU)
<ul style="list-style-type: none"> • Research and identify grant opportunities; 	<ul style="list-style-type: none"> • Conduct staff development relative to financial affairs and management;
<ul style="list-style-type: none"> • Disseminate information on grant opportunities; 	<ul style="list-style-type: none"> • Interfaces with the funding source to clarify budgetary issues such as, but not limited to: Pre-award budget and/or program negotiation, Budget and Program Amendments, and Performance Reports;
<ul style="list-style-type: none"> • Solicit funding partnerships with non-profit organizations, institutions of higher education, community organizations, businesses and municipalities; 	<ul style="list-style-type: none"> • Approves new grant program budgets;
<ul style="list-style-type: none"> • Conduct grant writing staff development 	<ul style="list-style-type: none"> • Reviews, edits and approves Budget and/or Program Amendments;
<ul style="list-style-type: none"> • Provide grant writing technical assistance; 	<ul style="list-style-type: none"> • Approves Transfer of Expenditures and Budget Transfers;
<ul style="list-style-type: none"> • Identify and contract with outside grant writers; 	<ul style="list-style-type: none"> • Provides technical assistance to the Project Manager on budgetary issues during the implementation period on issues such as, but not limited to: contracts, matching funds, statutory compliance guidelines;
<ul style="list-style-type: none"> • Provide technical review of grant applications; 	<ul style="list-style-type: none"> • Assists GDU in preparing grant budgets for grant applications submitted;
<ul style="list-style-type: none"> • Collaborate with district offices, regional centers and school-sites to align District priorities to appropriate funding opportunities; 	<ul style="list-style-type: none"> • Monitors and reports on grant expenditures and unauthorized PACs on a monthly basis; and
<ul style="list-style-type: none"> • Assist staff with Board Item preparation and process; 	<ul style="list-style-type: none"> • Act as liaison with funding agencies.
<ul style="list-style-type: none"> • Act as liaison with funding agencies; 	
<ul style="list-style-type: none"> • Reviews Appropriations Bills for funding allocations; and 	
<ul style="list-style-type: none"> • Review current funding trends. 	

RESPONSIBILITIES OF A PROJECT MANAGER

Project managers are responsible for the timely, accurate, and complete implementation of all phases of the grant. A project manager should:

- Read this handbook carefully. Use it as a reference, as a guide, and as a working document.
- Keep in close communication with your Office of Intergovernmental Affairs, Grants Administration, and Community Engagement (OIAGA) contacts. Ask questions and keep your contacts informed of your progress, concerns, and issues that require resolution.
- Adhere to District and department protocol; check information for accuracy and format; and communicate clearly, succinctly, and correctly.
- Become thoroughly familiar with the contents of your grant as approved by the funding agency. Review it carefully, as well as your approved budget, and the grant terms and conditions. Know all of the details pertaining to your project, know its extent and its limitations, and know the proper process for implementing each of the project components. Only after you have this thorough knowledge should you make any commitment or expend any funds.
- Become familiar with the procedures to be followed to prepare a School Board Agenda Item, particularly an item pertaining to Board approval of a grant and an item pertaining to Board approval of a Professional Services Contract.
- Develop planning documents, including a Budget Plan, a Supervision/Implementation Plan, Time and Effort Logs, and a Chronological Timeline. Review and update them periodically.
- Prepare folders for each segment/activity of your project and maintain documentation for audit purposes.
- Review the grant award noting especially details regarding the budget, the amendment process, the interim and final reports, and the terms and conditions of the grant.
- Become familiar with all of the information on the Grant Transmittal Sheet.
 - Crosscheck the figures with those on the budget approved by the funding agency. If there are any discrepancies, call your OIAGA contact immediately.
 - Know the final date for spending funds; use the requisition approval chain indicated.
 - Know how to transfer funds within the budget, if permitted by the grantor.
 - Know how and when to request an amendment to your project
 - Prepare throughout the project for the final report/evaluation; plan ahead, monitor frequently, and document on an ongoing basis.

- Become familiar with the Grants Availability Report and monitor it carefully. Utilize the monthly projection OIAGA prepares for you.
- Become familiar with the procedures, processes, rules, and regulations related to the employment of the personnel who will be hired to help you implement your project.
- Be certain that all payroll procedures are followed.
- Reconcile the Position Control List (PCL) to the actual positions and personnel charged to the program. The TAPS report is available on control D and is posted weekly.
- Ensure all Time and Effort Payroll Certification Reports are approved; document all time and effort devoted to grant activities. This applies **only** to those who are paid wholly or partially from federal or federal through state funds. There may be other agencies with similar requirements.
- Review all purchases made with grant funds. Although someone else at your worksite will probably have the responsibility for processing the actual purchase requests, you, however, must understand the process; you are responsible for overseeing those purchases made with your grant funds.
- Become familiar with the procedures you need to follow to prepare and process a professional services contract.
- Prepare contracts as early in your project as possible - - do not wait!
- Follow the established guidelines for travel, field trips, and transportation.
- Prepare throughout the project for the grant closeout; this means keep complete, clear, and accurate records and documents in a binder for each activity and each phase of your project.
- Determine whether you wish to submit a continuation proposal or to seek re-funding for your project with the agency providing current funding (or through another agency if the current agency does not make this option available).
- Adhere to any other district, state, federal, or granting agency rules, regulations, and/or procedures not specified here.



Step 1: Grant-Related Contracts (Document Checklist)

Date:	
Originating Office:	
Program Manager:	
Program Manager's Phone/Email:	
Shopping Cart #:	
Name of Vendor/Contractor:	

Minimum of three (3) to four (4) weeks prior to date of service(s) is required for routing the contract. A minimum of two (2) original copies of the contract and attachments must be routed.

ATTENTION: Several documents listed below have multiple signature lines that require approval by different offices / individuals. Contracts and ALL required attachments should be routed through ALL steps of the process.

The attached contract is being routed for signatures. The following documents have been completed and are included within this package. (Please mark or NA.)

- ERP (SAP) Shopping Cart evidence showing it has been fully approved and the chain of approvals
- Transmittal for Agreement Form for Contracted Services (FM-2452) must indicate the Procurement Authority.
- Contracts for \$6,000 and above require evidence that three (3) quotes were obtained, copy of advertisement placed, or copy of Professional Services Contract Committee Minutes.
 - Contracts for \$50,000 and above require documentation of Board action (Agenda Item) or documentation of exemption from bid and RFP requirements by the Professional Services Committee.
- Contract Intake & Transmittal Form (FM-7421)
- Under *Procurement Authority*, attach a letter from the vendor identifying themselves as the sole source provider; *if applicable*
- Two (2) original signed Agreement Forms for Contracted Services (FM-2453) with original signatures. All of the following signatures should be obtained: vendor (include Employer Identification Number or EIN), charge location administrator, Region Superintendent/Division Head, Procurement, and Risk Management officer.
- Contract dates and amounts must be correct: The dates in Item 1) Scope of Work - Dates/Hours of Service must be consistent with the dates in Item 2) Term of Agreement; amount on requisition must correspond to amount in Item 3) Compensation.
 - If Community Based Organization, please ensure that forms are initialed and signed by vendor and originating administrator where indicated. The only waiver to Jessica Lunsford Act is: (1) no contact with students or (2) vendor will not have access to school when students present. Must be accompanied by a memorandum explaining waiver applies and Payment Request for Contracted Services form (FM-2454).
- Contractor Conflict of Interest Form (FM-7420), *if applicable*
- Vendor proof of insurance: certificate of liability, professional liability, general liability, workers' compensation and auto liability insurance coverage, etc., *if applicable*
- If contract is submitted for approval after performance of actual services have started, it must be accompanied by a memorandum of justification for the delay in submission for approval. (Address memorandum to: Ms. Iraida R. Mendez-Cartaya, Associate Superintendent, Intergovernmental Affairs, Grants Administration and Community Engagement.)

PLEASE RETURN THIS FORM, ATTACHED CONTRACT(S) AND SUPPORTING DOCUMENTATION TO SBAB (1450 N.E. 2ND AVENUE, ROOM 760, MIAMI, FL 33132). CONTACT OIAGA FOR ANY QUESTIONS AT 305 995-1706.



Step 2: Grant-Related Contract Execution

Routing Cheat Sheet

A minimum of 2 original contract copies routed for signatures with all supporting documentation.
Contracts should be fully executed prior to the commencement of agreed upon services.

Step	Action / Place / Reason	Signature Required	Contact Person	Party Responsible for Tracking Contract	Step Completed (Responsible party please sign)
1	Vet contract for legal sufficiency between the vendor/partner and the School Board attorney <i>(Facilitated by the Program Manager)</i>	None	School Board Attorney as assigned	Charge location/School Program Manager	_____
2	Obtain signature of vendor or partner organization. <i>*Note: If a partner organization is giving/paying M-DCPS funds, the partner organization signs after the Superintendent.</i>	Legally authorized signature from vendor or partner organization	Varies	Charge location/School Program Manager	_____
3	Obtain signature of charge location administrator	M-DCPS charge location administrator	Varies	Charge location/School Program Manager	_____
4	Obtain signature of Region Superintendent <i>(If applicable)</i>	M-DCPS Region Superintendent	Varies	Charge location/School Program Manager	_____
5	Obtain signature of Division Head <i>*Note: If this is a Cabinet Member, should secure the Risk Management Officer's and the Attorney's signature prior</i>	M-DCPS Associate/ Assistant Superintendent	Varies	Charge location/School Program Manager	_____
6	Obtain signature of Procurement Office	M-DCPS Chief Procurement Officer	Varies	Charge location/School Program Manager	_____
7	Obtain signature of Risk Management Office	M-DCPS Risk and Benefits Officer	Risk Management Office	Charge location/School Program Manager	_____

Step	Action / Place / Reason	Signature Required	Contact Person	Party Responsible for Tracking Contract	Step Completed (Responsible party please sign)
8	Take contract to Grants Administration. Include this form plus all documentation referenced in it to continue routing through District offices.	None	OIAGA Staff	Charge location/School Program Manager	_____
9	Generate ERP (SAP) Shopping Cart and get it FULLY APPROVED through your location's chain of approvals. Please include a copy of the shopping cart with evidence that it has been fully approved in the contract packet.	None	Varies	Charge location/School Program Manager	_____
10	Obtain signature of School Board Attorney	M-DCPS School Board Attorney	School Board Attorney, as assigned	Grants Administration	_____
11	Obtain signature of the OIAGA Financial Reporting Unit (FRU)	FRU Director of Community Outreach	OIAGA Staff		_____
12	Obtain signature of Associate Superintendent OIAGA	M-DCPS Associate Superintendent OIAGA	OIAGA Staff		_____
13	Obtain signature of Superintendent <i>*Note: Follow internal review process as required</i>	M-DCPS Superintendent or authorized designee	OIAGA Staff		_____
14	Return original document to Charge location/School Program Manager	None	OIAGA Staff		_____
15	Attach original fully executed signed contract (electronic file) to the shopping cart from Step 8 in the ERP (SAP) system.	None	Varies	Charge location/School Program Manager	_____

Office of Superintendent of Schools
Board Meeting of August 14, 2019

July 25, 2019

Iraida R. Mendez-Cartaya, Associate Superintendent
Office of Intergovernmental Affairs, Grants Administration, and Community Engagement

SUBJECT: REQUEST AUTHORIZATION TO ACCEPT GRANT AWARDS/DONATIONS FOR THREE PROGRAMS FROM MULTIPLE FUNDING SOURCES AND ENTER INTO CONTRACTUAL SERVICE AGREEMENTS WITH THE AGENCIES PRESCRIBED IN THE GRANT

COMMITTEE: FISCAL ACCOUNTABILITY AND GOVERNMENT RELATIONS

LINK TO STRATEGIC BLUEPRINT: EFFECTIVE & SUSTAINABLE BUSINESS PRACTICES

Authorization is requested to accept three grant awards, in accordance with Budget Summary Forms, Attachment 1.a. through 1.c., for the approximate total of \$6,748,030, as follows:

Title of Funding Award	Funding Source	Amount	Funding Period	Type	Purpose
Adults with Disabilities (AWD) Grant Program	Florida Department of Education (FLDOE)	\$1,125,208 This allocation is the same as the 2018 -2019 allocation.	July 1, 2019 – June 30, 2020	Non-Competitive Recurring	To provide adults with intellectual and developmental disabilities the educational opportunities, community partnerships, and training for future workforce success.
Carl D. Perkins, Career and Technical Education Secondary Programs, Section 131	FLDOE	\$4,446,135 This allocation is \$227,315 or 5.39% increase from 2018-2019.	July 1, 2019 – June 30, 2020	Entitlement Recurring	To further develop the academic, career and technical skills of secondary education students who elect to enroll in career and technical education programs.
Carl D. Perkins, Career and Technical Education Postsecondary Programs, Section 132	FLDOE	\$1,176,687 This allocation is \$144,028 or 13.95% increase from 2018-2019.	July 1, 2019 – June 30, 2020	Entitlement Recurring	To further develop the academic, career and technical skills of postsecondary education students who elect to enroll in career and technical education programs.

E-201

RECOMMENDED: That The School Board of Miami-Dade County, Florida, authorize the Superintendent to:

1. accept three grant awards for programs from:
 - a. Florida Department of Education (FLDOE) for funding under Adults with Disabilities (AWD) Grant Program, in the approximate amount of \$1,125,208, for the grant period of July 1, 2019, through June 30, 2020;
 - b. Florida Department of Education (FLDOE) for funding under Carl D. Perkins, Career and Technical Education Secondary Programs, Section 131, in the approximate amount of \$4,446,135, for the grant period of July 1, 2019, through June 30, 2020; and
 - c. Florida Department of Education (FLDOE) for funding under Carl D. Perkins, Career and Technical Education Postsecondary Programs, Section 132, in the approximate amount of \$1,176,687, for the grant period of July 1, 2019, through June 30, 2020.
2. enter into contractual service agreements with the agencies prescribed in the grant, with whom the School Board must contract, pursuant to Board Policy 6320 – Purchase Approval and Competitive; Bidding Process Requirements;
3. extend these programs and contractual agreements as authorized through official notification from the granting agency in order to complete the goals of the program;
4. retain funds from the grant in an amount not to exceed the annually negotiated indirect cost rate, as allowed and approved by the FLDOE;
5. direct Financial Services to establish appropriations in the amount approved or as amended by the granting agency; such appropriations to be reported periodically to the Board;
6. authorize travel out-of-state as required by the grant parameters; and
7. eliminate any grant-funded position upon cessation of the grant funds, and place the impacted employee(s) on the Personnel Action Listing of Instructional and Non-Instructional Appointments, Reassignments, Leaves and Separations for the relevant period.

IRM-C:ym

Attachment 1.a.



THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA

BUDGET SUMMARY FORM

	<input checked="" type="checkbox"/>	Are there any in-kind or matching funds required?
Yes	No	

	<input type="checkbox"/>	Entitlement Grant
	<input checked="" type="checkbox"/>	Non-Entitlement/Contract

GRANT PROGRAM NAME: Adults with Disabilities Grant Program

Grant Period Beginning: July 1, 2019 Ending: June 30, 2020

FUNCTION		Total Budget	Salaries (51XX)	Employee Benefits (52XX)	Purchased Services (53XX)	Energy Services (54XX)	Materials and Supplies (55XX)	Capital Outlay (56XX)	Other Expenses (57XX)
INSTRUCTION SERVICES.....	5000	1,125,208.00	936,472.00	183,736.00			5,000.00		
SUPPORT SERVICES									
Pupil Personnel Services.....	6100	-							
Instructional Media Services.....	6200	-							
Instruction and Curriculum Development	6300	-							
Instructional Staff Training.....	6400	-							
Board of Education.....	7100	-							
General Administration.....	7200	- *							*
School Administration.....	7300	-							
Facilities Acquisitions & Construction...	7400	-							
Fiscal Services.....	7500	-							
Food Services.....	7600	-							
Central Services.....	7700	-							
Transportation Services.....	7800	-							
Operation of Plant.....	7900	-							
Maintenance of Plant.....	8100	-							
Community Services.....	9100	-							
Debt.....	9200	-							
TOTAL INSTRUCTION AND SUPPORT SERVICES		1,125,208.00	936,472.00	183,736.00	-	-	5,000.00	-	-

*Includes Federal Indirect Costs of: _____

Reviewed by: [Signature]
Division of Budget MF

Submitted for Board Approval/Authorization:

Agenda Item: E-201
(Number)

Board Meeting of: August 14, 2019
(Date)

FM-3182 Rev (03-98)



THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA

Attachment 1.c.

BUDGET SUMMARY FORM

	X	Are there any in-kind or matching funds required?
Yes	No	

X	Entitlement Grant
	Non-Entitlement/Contract

GRANT PROGRAM NAME: Carl D. Perkins, Career and Technical Education Post-Secondary Programs, Section 132

Grant Period Beginning: July 1, 2019 Ending: June 30, 2020

FUNCTION		Total Budget	Salaries (51XX)	Employee Benefits (52XX)	Purchased Services (53XX)	Energy Services (54XX)	Materials and Supplies (55XX)	Capital Outlay (56XX)	Other Expenses (57XX)
INSTRUCTION SERVICES.....	5000	815,686.00	57,404.00	10,984.00	59,900.00		34,077.00	653,321.00	
SUPPORT SERVICES									
Pupil Personnel Services.....	6100	-							
Instructional Media Services.....	6200	-							
Instruction and Curriculum Development	6300	-							
Instructional Staff Training.....	6400	317,346.00	194,887.00	51,856.00	14,853.00		3,750.00	40,000.00	12,000.00
Board of Education.....	7100	-							
General Administration.....	7200	16,255.00 *							16,255.00 *
School Administration.....	7300	-							
Facilities Acquisitions & Construction...	7400	-							
Fiscal Services.....	7500	-							
Food Services.....	7600	-							
Central Services.....	7700	-							
Transportation Services.....	7800	27,400.00			27,400.00				
Operation of Plant.....	7900	-							
Maintenance of Plant.....	8100	-							
Community Services.....	9100	-							
Debt.....	9200	-							
TOTAL INSTRUCTION AND SUPPORT SERVICES		1,176,687.00	252,291.00	62,840.00	102,153.00	-	37,827.00	693,321.00	28,255.00

*Includes Federal Indirect Costs of: 16,255.00

Submitted for Board Approval/Authorization:

Reviewed by: [Signature]
Division of Budget HF

Agenda Item: E-201
(Number)

Board Meeting of: August 14, 2019
(Date)

FM-3182 Rev (03-98)



THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA

Attachment 1.b.

BUDGET SUMMARY FORM

	X	Are there any in-kind or matching funds required?
Yes	No	

X	Entitlement Grant
	Non-Entitlement/Contract

GRANT PROGRAM NAME: Carl D. Perkins, Career and Technical Education Secondary Programs, Section 131

Grant Period Beginning: July 1, 2019 Ending: June 30, 2020

FUNCTION		Total Budget	Salaries (51XX)	Employee Benefits (52XX)	Purchased Services (53XX)	Energy Services (54XX)	Materials and Supplies (55XX)	Capital Outlay (56XX)	Other Expenses (57XX)
INSTRUCTION SERVICES.....	5000	3,758,625.00	1,034,333.00	325,364.00	150,635.00		61,687.00	1,586,823.00	599,783.00
SUPPORT SERVICES									
Pupil Personnel Services.....	6100	-							
Instructional Media Services.....	6200	-							
Instruction and Curriculum Development	6300	-							
Instructional Staff Training.....	6400	406,892.00	294,308.00	93,584.00	15,000.00		4,000.00		
Board of Education.....	7100	-							
General Administration.....	7200	96,158.00 *							96,158.00 *
School Administration.....	7300	-							
Facilities Acquisitions & Construction...	7400	-							
Fiscal Services.....	7500	-							
Food Services.....	7600	-							
Central Services.....	7700	-							
Transportation Services.....	7800	184,460.00			184,460.00				
Operation of Plant.....	7900	-							
Maintenance of Plant.....	8100	-							
Community Services.....	9100	-							
Debt.....	9200	-							
TOTAL INSTRUCTION AND SUPPORT SERVICES		4,446,135.00	1,328,641.00	418,948.00	350,095.00	-	65,687.00	1,586,823.00	695,941.00

*Includes Federal Indirect Costs of: 96,158.00

Submitted for Board Approval/Authorization:

Reviewed by: [Signature]
Division of Budget MF

Agenda Item: E-201
(Number)

Board Meeting of: August 14, 2019
(Date)

FM-3182 Rev (03-98)

BOARD ITEM FOR GRANT AWARD
Associate Superintendent
Intergovernmental Affairs, Grants Administration, and Community Engagement

Board Meeting: August 14, 2019	Item #: E-201 1.a.	Originator: Mr. Luis E. Diaz																								
<p>Directions: Complete this document with clear and concise information that is drawn from the Request for Proposal, Grant Application, and/or Grant Award Notification. In addition, provide historical or contextual information that provides program background.</p>																										
Title of Grant	Funding Source	Amount	Grant Period	Type (Entitlement/Allocation or Competitive)	Purpose																					
Adults with Disabilities (AWD) Grant Program	Florida Department of Education (FLDOE)	\$1,125,208 This allocation is the same as the 2018 -2019 allocation.	July 1, 2019 – June 30, 2020	Non-Competitive Recurring	To provide adults with intellectual and developmental disabilities the educational opportunities, community partnerships, and training for future workforce success.																					
<p>1. Historical information (number of years of implementation; key successful components).</p> <ul style="list-style-type: none"> • Funding History: <table style="width: 100%; border: none;"> <tr> <td style="width: 33%;">2000-2001 \$2,378,732</td> <td style="width: 33%;">2006-2007 \$2,232,136</td> <td style="width: 33%;">2012-2013 \$1,125,208</td> </tr> <tr> <td>2001-2002 \$2,229,829</td> <td>2007-2008 \$2,060,427</td> <td>2013-2014 \$1,125,208</td> </tr> <tr> <td>2002-2003 \$2,229,829</td> <td>2008-2009 \$1,836,270</td> <td>2014-2015 \$1,125,208</td> </tr> <tr> <td>2003-2004 \$2,229,829</td> <td>2009-2010 \$1,755,584</td> <td>2015-2016 Program Not Funded</td> </tr> <tr> <td>2004-2005 \$2,229,829</td> <td>2010-2011 \$1,668,132</td> <td>2016-2017 \$1,125,208</td> </tr> <tr> <td>2005-2006 \$2,232,136</td> <td>2011-2012 \$1,323,776</td> <td>2017-2018 \$1,125,208</td> </tr> <tr> <td></td> <td></td> <td>2018-2019 \$1,125,208</td> </tr> </table> • The program has supported more than 90 community-based organizations (CBOs) serving the target population through affiliating agreements with 9 adult education centers and technical colleges. • The purpose of the grant is to permit the district to offer lifelong learning activities to needy populations of residents who would be unable to access educational services without this support. • M-DCPS provides educational services through our Workforce Education funds to adults who self-declare a disability when registering at our adult centers and Technical Colleges. • The total number of adults and senior citizens with disabilities served during 2014-2015 was 3,725. • Funding was not provided in 2015-2016 and was reinstated for 2016-2017. • The total number of adults and senior citizens with disabilities served during 2016-2017 was 2628. The total number of adults and senior citizens with disabilities served during 2017-2018 was 2731. • The total number of adults and senior citizens with disabilities served during 2018-2019 was 2403. 						2000-2001 \$2,378,732	2006-2007 \$2,232,136	2012-2013 \$1,125,208	2001-2002 \$2,229,829	2007-2008 \$2,060,427	2013-2014 \$1,125,208	2002-2003 \$2,229,829	2008-2009 \$1,836,270	2014-2015 \$1,125,208	2003-2004 \$2,229,829	2009-2010 \$1,755,584	2015-2016 Program Not Funded	2004-2005 \$2,229,829	2010-2011 \$1,668,132	2016-2017 \$1,125,208	2005-2006 \$2,232,136	2011-2012 \$1,323,776	2017-2018 \$1,125,208			2018-2019 \$1,125,208
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		2018-2019 \$1,125,208																								
<p>2. If schools are included in the grant, provide the criteria for the selection of schools. State whether the criteria was identified by the funder or the applicant.</p> <p>Community-based organizations identify the needs and will approach the adult education center. Also, adult education centers and technical colleges may identify needs and seek out the appropriate agency. The funder does not identify the criteria for the selection of schools.</p>																										

Directions: Complete this document with clear and concise information that is drawn from the Request for Proposal, Grant Application, and/or Grant Award Notification. In addition, provide historical or contextual information that provides program background.

NAME OF SCHOOL	REGION	VOTING DISTRICT
Coral Gables Adult Center	AC	6
D. A. Dorsey Technical College	AC	2
The English Center	AC	6
Lindsey Hopkins Technical College	AC	2
Miami Beach Adult Center	AC	3
Hialeah-Miami Lakes Adult Center	AC	4
Miami Springs Adult Education Center	AC	5
North Miami Adult Center	AC	1
W. H. Turner Technical Arts H.S.	AC	2

3. What are the instructional implications and impact of this grant? If the program/initiative has been evaluated, provide evaluation date and synopsis. If not, has an evaluation been requested?

This grant supports our ability to offer programs that: maintain the highest possible level of cognitive ability; halt or reverse intellectual decline, enhance self-esteem, and enhance the students' creative abilities. Each adult center and technical college providing services through the grant participates in a review of required documentation and conducts site visits to every CBO that houses the adults and senior citizens with disabilities programs.

4. Impact on District

- **Operations:** This grant is managed by School Operations and supports more than 80 community-based organizations (CBOs) serving the target populations through affiliation with 9 adult education centers and technical colleges. The total number of adults and seniors with disabilities served during 2017-2018 was 2731.
- **Financial:** This program has been supported entirely by performance-based funding.
- **Budget:** \$1,125,208
- **Contracts:** N/A

Is the vendor a non-profit? Minority/Women Business Enterprise (M/WBE) certified? Small/Microbusiness Business Enterprise certified? N/A

How was the vendor selected? Is the requirement for requesting competitive solicitation from three or more sources waived pursuant to Board Policy 6320, Purchase Approval and Competitive Bidding Process Requirements, F. 2? N/A

Describe the procurement process for this vendor. N/A

Directions: Complete this document with clear and concise information that is drawn from the Request for Proposal, Grant Application, and/or Grant Award Notification. In addition, provide historical or contextual information that provides program background.

Name of the Grant Program

Category	Amount	% of Total Grant Amount	FTE	Description
Personnel				
Part-time Hourly	\$936,472.00	83.22%		Hourly Personnel - This category will be used for adults and senior citizens with disabilities.
Fringe Benefits	\$183,736.00	16.32%		Fringe Benefits
Subtotal Personnel & Fringes	\$1,120,208.00			
Professional/Technical				
Subtotal Prof/Tech				
Furniture, Fixtures and Equipment				
Travel				
Subtotal Travel				
Other				
Supplies	\$5,000.00	.46%		Classroom Supplies
Subtotal Other				
Indirect Cost				
Total	\$1,125,208.00	100%		

- **Staffing:** The grant is used for program supplies and for salaries and fringe benefits to support part-time hourly teachers.
- **Future Work:** This grant has been funded by FLDOE since 2001. There was a break in funding in 2015-2016. Continued funding is anticipated.

5. Is item a recurring item? Yes

6. Controversial issues of importance to the Board. N/A

7. Is the grant a follow-up of a previous Board Member item or was it requested by a Board Member? Who? N/A

8. Staff member who will be present at Committee and Board meeting to answer questions.

Name: Luis E. Diaz

Title: Assistant Superintendent

Board Meeting: August 14, 2019	Item #: E-201 1.a.	Originator: Mr. Luis E. Diaz
Directions: Complete this document with clear and concise information that is drawn from the Request for Proposal, Grant Application, and/or Grant Award Notification. In addition, provide historical or contextual information that provides program background.		
Office: School Operations Telephone Number: 305-995-1270		

The School Board of Miami-Dade County Bylaws & Policies

Unless a specific policy has been amended and the date the policy was revised is noted at the bottom of that policy, the Bylaws and Policies of the Miami-Dade County Public Schools were adopted on May 11, 2011 and were in effect beginning July 1, 2011.

6320 - PURCHASING

All procurement of supplies, materials, equipment, and services paid for from county school funds shall be the responsibility of the procurement department under the general supervision of the Chief Procurement Officer and shall be made in accordance with all applicable State statutes, Florida State Board of Education Rules, School Board policies, and administrative procedures.

No person may make any purchase with Board funds unless authorized to do so by Board policy or by administrative directive, or manuals approved by the Superintendent.

The agency designated for making purchases with Board funds is the Board's Procurement Management Services.

Payment for any unauthorized purchase(s) may be the responsibility of the person placing the order.

Definitions

- A. *Commodity Code* - system of words, numbers, or both, designed to identify and list goods and services by classes and subclasses.
- B. *Competitive Solicitation* - purchasing made through the issuance of an invitation to bid, request for proposals, and invitation to negotiate.
- C. *Construction Services* - all labor, services, and materials provided in connection with the construction, alterations, repair, demolition, reconstruction, or any other improvements to real property.
- D. *Cooperative Purchasing* - action taken when two (2) or more entities combine their requirements to obtain advantages of volume purchases including administrative savings and other benefits. Cooperative procurement efforts may result in contracts that other entities may "piggyback".
- E. *Invitation to Bid* - a written solicitation for competitive sealed bids used when the Board is capable of specifically defining the scope of work for which a contractual service is required or when the Board is

capable of establishing precise specifications defining the actual commodity or group of commodities required.

- F. *Invitation to Negotiate* - a written solicitation for competitive sealed replies to select one (1) or more vendors with which to negotiate for the procurement of commodities or contractual services used when the Board determines that negotiations may be necessary to receive the best value.
- G. *Originating Department* - the department requesting informal and/or formal solicitations. This department is responsible for the product and/or services sought and for monitoring vendor performance.
- H. *Purchasing Cards (PCards)* - a payment method in which School District requisitioners purchase directly from a vendor using a credit card; a pre-established credit limit is generally established for each card issued.
- I. *Procurement Authority* - documentation establishing that a purchase requisition, PCard, fund reservation, or draft contract adheres to the competitive bidding process or meets criteria for an exemption in this policy.
- J. *Proposer* - vendors submitting bids or responses to a competitive solicitation.
- K. *Request for Information* - a non-binding method whereby a jurisdiction publishes via newspaper, internet, or direct mail its need for input from interested parties for an upcoming solicitation. A procurement practice used to obtain comments, feedback, or reactions from potential suppliers (contractors) prior to issuing of a solicitation. Generally price or cost is not required. Feedback may include best practices, industry standards, technology issues, etc.
- L. *Request for Proposals* - a written solicitation for competitive sealed proposals used when it is not practicable for the Board to specifically define the scope of work for which the commodity, group of commodities, or contractual service is required and when the Board is requesting that a responsible vendor propose a commodity, group of commodities, or contractual service to meet the specifications of the solicitation document.
- M. *State Appropriated Funds* - funds appropriated in the Florida General Appropriations Act, excluding Federal funds; does not include general obligation bond funds for capital construction or funds raised through local capital outlay millage.
- N. *Unauthorized Purchases* - an agreement, a commitment, or an order for goods or services, construction, or changes to existing contracts, by any person who does not have an approved purchase

order, fund reservation, and/or PCard approval, and includes (1) purchases made without the required competitive bidding, (2) purchases made in advance of an approved purchase order, fund reservation, and/or PCard approval, and (3) changes under existing contracts made by a person who does not have delegated procurement authority.

- O. *Vendor File* - accumulated record of a vendor maintained by Procurement Management Services, including information on the vendor's relationship with the Board, application for inclusion on the bidder's list, record of performance under contracts, and correspondence.

Purchase Approval and Competitive Bidding Process Requirements

Responsibilities

The Superintendent shall be responsible for the procurement of supplies, materials, equipment, and services paid for from Board funds. The several schools, departments, and agencies of the District under the jurisdiction of the Board shall purchase their materials or commodities through the Procurement Management Services, the Board's official purchasing agency. All purchases shall comply with law, rules, regulations, and Board policies. The Superintendent may approve or reject purchase requisitions when the total amount does not exceed \$50,000 or the current threshold set by statute. Purchases in excess of \$50,000 or current threshold set by statute shall be approved by the Board except for those delineated below:

- A. The Superintendent may be authorized to purchase commodities or contractual services where the total amount does not exceed an amount prescribed by the Board, and does not exceed the applicable appropriation in the District budget. The Superintendent may also be authorized to purchase commodities or is exempt by statute or Florida Administrative Code, or contractual services under Department of Management Services State term contracts. The Superintendent may authorize designated staff to perform these purchasing tasks.
- B. Where the purchasing agent for any public agency is authorized by law to make purchases for the benefit of other governmental agencies within the county, the Board shall have the option to purchase under the current contracts as established for these public agencies at or below the stated unit price, if the purchase is economically advantageous to the Board, and the items purchased conform to the standards and specifications prescribed by the Superintendent.
- C. As required by F.S. 1001.42(12)(j), the Board shall receive and consider available prices according to the rules of the Department of Management Services, Division of Purchasing. The Board may use prices established by the Division of Purchasing through its State purchasing agreement price schedule. If Board policy provides for purchasing under this State purchasing program, the conditions for use shall be those imposed on State agencies.
- D. In lieu of requesting competitive solicitations from three (3) or more sources, the Board may make purchases at or below the specified prices from contracts awarded by other city or county governmental agencies, other school boards, community colleges, Federal agencies, the public or governmental agencies of any state, or from State university system

cooperative bid agreements, when the proposer awarded a contract by another entity permits purchases by a school board on the same terms, conditions, and prices (or below such prices) awarded in the contract, and the purchases are economically advantageous to the Board.

- E. Except as authorized by law or rule, competitive solicitations shall be requested from three (3) or more sources for any authorized commodities or contractual services exceeding \$50,000.

- F. The requirement for requesting competitive solicitations for commodities or contractual services from three (3) or more sources is waived pursuant to F.S. 1010.04(4)(a), for:
 - 1. the purchase by the Board of professional services which shall include artistic services, academic program reviews, lectures by individuals, auditing services not subject to F.S. 218.391, legal services, including attorney, paralegal, expert witness, court reporting, appraisal or mediator services; and health services involving examination, diagnosis, treatment, prevention, medical consultation or administration; and

 - 2. the purchase by the Board of educational services and copyrighted materials including educational tests, textbooks, printed instructional materials, computer software, films, filmstrips, videotapes, DVDs, disc or tape recordings, digital recordings, or similar audio-visual materials, and for library and reference books, and printed library cards where these materials are purchased directly from the producer or publisher, the owner of the copyright, an exclusive agent with the State, a governmental agency or a recognized educational institution.

- G. The Board shall have the authority to reject any or all proposals submitted in response to any competitive solicitation and to request new proposals or purchase the required commodities or contractual services in any other manner authorized by this section.

- H. The purchase of food products except milk, required for the School Food Service Program and other ancillary food operations are exempt from the bid requirements pursuant to State Board of Education Rule F.A.C. 6A-7.0411(2)(i)2.

- I. Additional exemptions authorized under certain conditions:

The requirements for requesting competitive solicitations and making purchases for commodities and contractual services are waived pursuant to F.S. 1010.04(4)(a), when the following conditions have been met by the Board:

- 1. competitive solicitations have been requested in the manner prescribed by this rule, and

2. the Board has made a finding that no valid or acceptable firm proposal has been received within the prescribed time.

When such a finding has been officially made, the Board may enter into negotiations with suppliers of such commodities and contractual services and shall have the authority to execute contracts with such vendors under the terms and conditions the Board determines are in its best interests.

If fewer than two (2) responsive proposals for commodity or contractual services are received, the Board may negotiate the best terms and conditions or decide to reject all proposals. The Board shall document the reasons that negotiating terms and conditions with the sole proposer is in the best interest of the School District in lieu of soliciting new proposals.

- J. Commodities or contractual services available from a single source may be exempted from the competitive solicitation requirements. When the Board believes that commodities or contractual services are available only from a single source, the Board shall electronically or otherwise publicly post a description of the commodities or contractual services for a period of at least seven (7) business days. The description must include a request that prospective vendors provide information regarding their ability to supply the commodities or contractual services described. If it is determined in writing by the Board, after reviewing any information received from prospective vendors, that the commodities or contractual services are available only from a single source, the Board shall provide notice of its intended decision to enter a single source contract in the manner specified in F.S. 120.57(3), and may negotiate the best terms and conditions with the single source vendor.
- K. The Board may dispense with requirements for competitive solicitations for the emergency purchase of commodities or contractual services when the Superintendent determines in writing that an immediate danger to the public health, safety, or welfare or other substantial loss to the School District requires emergency action. After the Superintendent makes such a written determination, the Board may procure commodities or contractual services necessitated by the immediate danger, without requesting competitive solicitations. However, such an emergency purchase shall be made by obtaining pricing information from at least two (2) prospective vendors, which must be retained in the contract file, unless the Superintendent determines in writing that the time required to obtain pricing information will increase the immediate danger to the public health, safety, or welfare or other substantial loss to the District.
- L. A contract for commodities or contractual services may be awarded without competitive solicitations if State or Federal law, a grant or a State or Federal agency contract prescribes with whom the Board must contract or if the rate of payment is established during the appropriations process.
- M. A contract for regulated utilities or government-franchised services may be awarded without competitive solicitations.

- N. As much as practicable, all purchases shall be based on contracts, purchasing card systems, electronic procurements, or purchase orders.
- O. The Board, when acquiring, whether by purchase, lease, lease with option to purchase, rental or otherwise, information technology, as defined in F.S. 282.0041(15), may make acquisitions through the competitive solicitation process or by direct negotiation and contract with a vendor or supplier, as fits the needs of the School District as determined by the Board.
- P. Except as otherwise required by statute, the Board, when purchasing insurance, entering risk management programs, or contracting with third party administrators, may use the competitive solicitation process or direct negotiations and contract.
- Q. Emergency purchases made and approved by the Superintendent or the Superintendent's designated representative. The Superintendent will report all emergency purchases to the Board, as soon as possible.

When an emergency arises, circumstances contributing to such an emergency shall be communicated to the proper department or agency of the Board, which in turn will notify Procurement Management, requesting the emergency purchase.

A requisition for an emergency purchase shall be accompanied by the appropriate Emergency Purchase Request Form, explaining the circumstances creating the emergency and clarifying that immediate action is required to protect the Board's interests. Emergency purchases are divided into two (2) categories as follows:

1. Emergency Purchase Request (Form B FM-3739) estimated expenditure \$50,000 and under requires the signature of the initiating administrator, recommended by Director or above and approval by the Assistant Superintendent or above.
 2. Emergency Purchase Request (Form A FM-2333) estimated expenditure over \$50,000 requires the signature of the initiating administrator, recommended by the Assistant Superintendent or above, or his/her designee(s) and approval by Superintendent or designee. Emergency purchases over \$50,000 shall be reported to the Board.
- R. Competitive bidding is waived for purchases of maintenance and/or service contracts, on various types of technical equipment, that are offered and/or supplied only by the original manufacturer or its representative, or that are required to maintain the integrity of the manufacturer's warranty, or that are part of the manufacturer's rental/lease/lease purchase agreements terms and conditions.

S. Non-Purchase Order Invoice Funds Reservation Purchases/Check Requests are purchases for goods and services, expenditures, fund transfers, etc., that are not appropriate for normal competitive purchasing procedures. Periodically, these purchases shall be reviewed by procurement staff to ensure compliance with this Board policy. Only the expenditures listed below will be authorized and processed as Non-Purchase Order Invoice Funds Reservation/Check Requests Purchases. Non-Purchase Order Invoice Funds Reservation/Check Requests purchases require the same financial authorization and approval process as purchase requisitions and shopping carts. Those purchases for goods and services, expenditures, fund transfers, etc., that are authorized for Non-Purchase Order Invoice Funds Reservation/Check Requests Purchases are limited to include various types of fund advances, services, reimbursements and purchases, and/or payment for goods and services, which are not appropriate for normal competitive purchasing procedures:

1. additional services where a professional service contract is not required or there is no bid in place (polygraph, transcribing, etc.)
2. employee related admission/registration fees to workshops and conferences that are not expensed to out-of-county travel (all out-of-county travel must be entered through and approved by the travel system process)
3. association fees, professional association dues, academy certification requirements and District membership to organizations
4. internal distribution of funds to school athletic programs, vending machine commissions, diplomas, and savings programs
5. District rental/lease of facilities
6. all utility service, connection charges, and fees
7. graduation program fees (non-employees, union charges, etc.), including facility rental, equipment requirements, foliage rental, non-employees, and union charges
8. student related field trips that are not quoted from a District bid or contract, tickets, and admissions to parks, registration fees for competitions, and hotel accommodations
9. groceries and supplies for educational use in alternative programs or academic requirements
10. insurance policies payments/reimbursements, State fees (retirement, unemployment compensation, etc.), tax related payments, legal settlement payments and bonds, license fees and agreements, permit fees, property loss payment

- 11. media advertising (newspaper, radio, television, banners, brochures, pamphlets, etc.)
 - 12. grant authorized workshop reimbursements including refreshments
 - 13. petty cash replenishment
 - 14. postage requisitions
 - 15. toll charges for authorized District departments
 - 16. travel reimbursement for non-employees
- T. In accordance with State law and Policy [6327](#), Public-Private Partnerships and Unsolicited Proposals, the Superintendent may submit proposed public-private partnership agreements for qualifying projects, including those resulting from unsolicited proposals, to the Board for consideration. The Superintendent and Board shall evaluate and consider all proposed public-private partnership agreements according to the guidelines in F.S. 255.065 and Policy [6327](#).
- U. Contracts for legal services by the Board attorney and the attorneys supervised by the Board attorney, contracted third party claims administration, nonpublic school placements and other services/goods for which selection procedures are provided by State statute, State Board rule, or other Board policy.
- V. The Professional Services Contract Committee (PSCC) may consider requests for exceptions from competitive bidding. The PSCC shall be comprised of representatives, as stated in the attendee requirements for an evaluation committee. The PSCC may grant exceptions for sole source contracts, contractors having specific expertise, or as otherwise determined by the PSCC to be in the best interest of the Board. The PSCC will be used in extenuating circumstances only. For contracts with an annual estimated cost of more than \$50,000, exceptions recommended by the PSCC must be approved by the Board.
- W. Procurement Management Services staff will provide the Board a quarterly written expenditure report of purchases made using the exemptions above and that exceed \$100,000.00. The report shall include date of purchase, vendor, amount, funding source, and purchasing authority.

Competitive Bidding Requirement

- A. **Purchasing Thresholds for Competitive Bidding**

The following provides a summary of the purchasing thresholds and the corresponding procurement documents allowed to facilitate the purchases:

1. Zero dollars (\$0) to \$999 - shall obtain one (1) written and dated quotation, with an applicable expiration date such as ninety (90) days.
2. \$1,000 to \$49,999 - shall obtain three (3) written, telephonic, or electronic and dated quotation(s), which may be completed using a Request for Quotes template.
3. \$50,000 and above - shall utilize the Invitation to Bid, Invitation to Negotiate, or the Request for Proposal template(s).

B. Development of Specifications, Determination of Quantities, and Standardization of Supplies and Equipment

1. To achieve both quality control and the price advantages of quantity purchasing, the administration shall:
 - a. establish specifications for goods and services as needed;
 - b. identify several existing, commercially available "standard brands" that meet the specifications acceptable as examples; and
 - c. invite vendors to bid on the standard brands identified or their equivalent.
2. All bid quantities and specifications shall be transmitted to Procurement Management Services by the originating department in writing. The originating department shall also certify to Procurement Management Services in writing that the specifications for an existing bid (to be rebid) are still appropriate before issuance of the bid. Specifications originated by Procurement Management Services shall follow similar certification procedures.
3. All increases to quantities specified in an existing term bid requiring a supplemental bid award shall be requested in writing by the originating department, countersigned by an administrator reporting directly to the Superintendent, and identifying the reason why the increase in quantities was unavoidable. If an adequate reason cannot be identified, then the corrective action to be taken by the originating department to prevent a future underestimate of quantities shall be described. A similar procedure will be followed for term bids originated by Procurement Management Services.

4. All changes to specifications for an existing bid (to be rebid) or similar bid shall be identified in writing, including the reason for the change, by the originating department or Procurement Management Services if it is the originator.
5. The Chief Procurement Officer of Procurement Management Services shall identify specifications which appear to limit the bidding process to a single vendor. In the event that the Chief Procurement Officer has identified such a set of specifications, the originating department shall be required to justify in writing the specifications which appear to favor a single vendor. This documentation shall be countersigned by an administrator reporting directly to the Superintendent.

C. Written or Electronic Quotations (Request for Quotes)

For each purchase of \$50,000 or less and over the minimum quotation threshold established by Procurement Management Services, staff shall obtain written, telephone, or electronic quotations from three (3) or more sources. If possible, vendors contacted shall include M/WBE vendor participation. If only one (1) of those sources respond with prices, two (2) additional sources, if available, may be contacted for pricing, including, if possible, an M/WBE vendor. If no additional prices are obtained from those sources, the award shall be made to the vendor who submitted the lowest and best price quotation. If all three (3) of the vendors first contacted for prices respond with valid price quotations, the award shall be made to the vendor who submitted the lowest price quotation meeting the bid specifications, with no additional requests from other vendors required.

Quotations obtained shall be attached to or included with the purchase order by written notations or electronic reference indicating quotation prices and sources, certification by signature or facsimile. The requisition shall be approved for purchase as authorized by the Superintendent. All internal fund purchases shall comply with Policy [6610](#).

D. Invitation to Bid (ITB)

Invitation to Bid may be used when the Board is capable of specifically defining the scope of work for which a contractual service is required or when the Board is capable of establishing precise specifications defining the actual commodity or group of commodities required.

The following process shall be followed for an ITB:

1. For contracts estimated to be more than \$50,000 annually:
 - a. In accordance with Board Policy [6320.02](#), the Goal Setting Committee (GSC) shall review the summary scope of work to determine Small Business Enterprise (SBE), Micro Business Enterprise (MBE), M/WBE, or

commodities or contractual services required by the Board during the term of the contract. Multiple awards to the lowest responsive and responsible bidders are permitted when multiple awards are clearly allowed by the bid solicitation documents. Also, awards shall be made to preapproved vendor(s), where price is not an evaluation factor and bidders are responsive to other factors noted within the solicitation document.

5. When the determination is made that a bid is appropriate, the performance specifications and standard requirements shall be stated in detail and shall be furnished to Procurement Management Services by the originating department. After review, Procurement Management Services shall issue the invitation to bids, including all general and special conditions, and evaluate the bids submitted. The requirements for solicitation and review of bids by the Goal Setting Committee (GSC) shall be followed in all cases. Board approval is required for contracts recommended for award.
6. For each purchase of more than \$50,000, bids shall be noticed publicly to ensure open competition. Notices of bids shall be electronically posted or may be sent to all vendors on the active vendor mailing list(s) per commodity code(s). This list shall include all minority/women business enterprises (M/WBE) vendors, identified by the Board in accordance with Policy [6320.02](#), for that particular category of goods or services, as well as organizations involved in assisting M/WBEs. Notices of bids shall be advertised in one (1) or more major local newspapers or electronically posted at least seven (7) days prior to the bid opening date. This may include, as necessary, major newspapers having circulation representative of the various relevant minority classifications or electronic posting. Tabulations of current bids shall be retained in bid files and shall be available for reference. Standard bid forms used shall be those reviewed and approved by the Board attorney's office.
7. Any additional evaluation criteria, such as small or micro-business enterprise, minority and/or veteran preferences that are referenced in the solicitation document shall be reviewed and evaluated.

E. Request for Proposals (RFP)

The Board may award contracts to one (1) or more responsive, responsible proposers in accordance with the selection criteria published in the request for proposal. The Board is not required to solicit request proposals for purchases made from contracts of the Department of Management Services.

The RFP shall be used when it is not practicable for the Board to specifically define the scope of work for which the commodity, group of commodities, or contractual service is required and when the Board is requesting that a responsible vendor propose a commodity, group of

commodities, or contractual service to meet the specifications of the solicitation document.

The following process shall be followed for an RFP:

1. For contracts estimated to be more than \$50,000 annually:
 - a. In accordance with Board Policy [6320.02](#), the GSC shall review the RFP to determine Small Business Enterprise (SBE), Micro Business Enterprise (MBE), M/WBE or VBE participation in the project.
 - b. The RFP shall be advertised to solicit maximum vendor participation. To enhance M/WBE participation, advertisements may be published and announced in major publications that serve minority communities and it shall be posted electronically.
2. For contracts estimated to cost less than \$50,000 annually:
 - a. There must be evidence that at least three (3) vendors were contacted in writing, and if possible, at least one (1) of these vendors shall be a M/WBE.
 - b. If only one (1) potential vendor is known, an advertisement shall be placed in an appropriate publication that is widely distributed. If no responses are received, the contract can be developed with the one (1) known vendor in accordance with other established procedures.
3. The RFP shall include an implementation schedule consisting of the following:
 - a. GSC meetings,
 - b. mailing/posting date,
 - c. pre-proposal conference (if required),
 - d. opening date and time documented by bid opening minutes,
 - e. oral presentations (if required),
 - f. recommendation of award process and to the Board,

3. When committees are established to evaluate a RFP or ITN, the Procurement Management Services staff will conduct the meetings, and ensure that: 1) minutes are recorded, and 2) proper documentation and records of committee actions are maintained.
4. The evaluation committee's written recommendation must include the following for inclusion in the master bid file within Procurement Management Services:
 - a. clear objective of the RFP,
 - b. identification of the committee members,
 - c. committee meeting dates and brief synopsis of the general discussion,
 - d. dates of any or all oral presentations,
 - e. name and location of the offeror(s),
 - f. evaluation criteria,
 - g. explanation of the basis for selection,
 - h. recommendation of acceptance of the offeror(s) proposal,
 - i. committee member votes or tabulation results.

- H. When the committee evaluation process is complete, the Superintendent will forward the recommendations to the Board for approval before any contract will be issued.

Purchase Requisitions

District schools, departments, and agencies shall initiate a properly executed purchase requisition, containing authorized approvals of the originating administrator, principal, department or agency head, for the purchase of any and all items desired, except where small purchases, transactions not in excess of \$3,000.00 per requisition, and market difficulties, make the cost of some purchases in this manner economically unsound. In those instances, administrative directives or operating manuals may be issued, when deemed necessary, containing the procedures to economically perform the purchasing function within the controls required and authority provided by Florida statute, Florida Board of Education Administrative Rules and Board policies.

Split requisitions, to bypass the approval requirements and/or the bidding process, are specifically forbidden.

Requisitions must contain the appropriate authorized approvals as prescribed by administrative procedures for the SAP system, as well as documented procurement authority. Fully approved requisitions will be reviewed and approved by

procurement staff to ensure proper application of this policy and will be converted to approved purchase orders for release to the vendors.

Unauthorized Purchases

As defined, unauthorized purchases are agreements, commitments, or an order for goods or services or construction, or changes to existing contracts by any District staff and/or school site staff who does not have an approved purchase order, fund reservation and/or PCard approval. Also unauthorized are (1) purchases made without the required competitive bidding, (2) purchases made in advance of an approved purchase order, fund reservation and/or PCard approval, and (3) changes under existing contracts made by a person who does not have delegated procurement authority.

Unauthorized purchases are not binding on the District. Payment for any unauthorized purchase may be the responsibility of the staff person placing the order. Additional disciplinary action may be taken against the responsible staff person.

For each suspected incident of an unauthorized purchase, procurement staff will notify the staff person(s) involved and request appropriate documentation to authorize or cancel the purchase and to ensure future compliance with this policy.

Protests

A bidder, who wishes to file a bid protest, must file such notice and follow procedures prescribed by F.S. 120.57(3) and Bylaw 0133, for resolution.

Protest of Specifications

Any notice of protest of the specifications contained in an Invitation to Bid (ITB) or Request for Proposal (RFP) or Invitation to Negotiate (ITN) shall be filed accordance with Board Bylaw 0133.

For a protest of the specifications contained in an Invitation to Bid (ITB) or in a Request for Proposals (RFP) or Invitation to Negotiate (ITN), the Notice of Protest shall be filed in writing within seventy-two (72) hours after the posting of a solicitation. The Formal Written Protest shall be filed within ten (10) calendar days after the date the notice of protest is filed. Failure to file a Notice of Protest or failure to file a Formal Written Protest shall constitute a waiver of proceedings under this rule. The Formal Written Protest shall state with particularity the facts and law upon which the protest is based. Saturdays, Sundays, and legal holidays shall be excluded in the computation of the seventy-two (72) hour time period provided by this paragraph.

Posting the Bond

The protesting party shall post a bond in a form consistent with F.A.C. Rule 28-110.005(2). A notice of decision or intended decision shall contain this statement: "Failure to file a protest within the time prescribed in F.S. 120.57(3), or failure to post the bond or other security required by law within the time allowed for filing a bond shall constitute a waiver of proceeding under F.S. Chapter 120."

- A. Bond: Commodities (Other than Lease of Space) and Contractual Services (Including Professional Services and Insurance) – Pursuant to F.S. 287.042(2)(c), any person who files an action protesting a decision or intended decision pertaining to a solicitation or contract award shall post with the Board, at the time of filing the formal written protest, a bond secured by an acceptable surety company in Florida, payable to The School Board of Miami-Dade County, Florida, in an amount equal to one percent (1%) of the District's estimate of the dollar value of the proposed contract.
 1. The District shall provide the estimated contract amount to the protestor within seventy-two (72) hours (excluding Saturdays, Sundays, and holidays when the District administrative office is

closed) after the filing of the Notice of Protest. The estimated contract amount is not subject to protest under this policy or F.S. 120.57(3). In lieu of a bond, the Board may accept a cashier's check or money order in the amount of the bond.

2. The bond shall be conditioned upon the payment of all costs and charges which may be levied against the protestor in the administrative hearing in which the action is brought and in any subsequent appellate court proceeding.
 3. Pursuant to F.S. 287.042(2)(c), if, the Board prevails in the administrative hearing process and any appellate court proceedings, it shall be entitled to recover all costs and charges which are included in the final order or judgment, excluding attorneys' fees. Upon payment of such costs and charges by the person protesting the decision or intended decision or contract award, the bond, cashier's check, or money order shall be returned to the protestor. If the protestor prevails, the protestor may recover from the Board the costs and charges which are included in the final order or judgment, excluding attorneys' fees.
- B. **Bond: Competitive Bids for Lease of Space --** Pursuant to F.S. 255.25(3)(c), any person who files an action protesting a decision or intended decision pertaining to a competitive bid for space to be leased by the Board shall post with the Board, at the time of filing the formal written protest, a bond payable to the Board in an amount equal to one percent (1%) of the estimated total rental of the basic lease period or \$5,000, whichever is greater. The bond shall be conditioned upon the payment of all costs which may be levied against him/her in the administrative hearing in which the action is brought and in any subsequent appellate court proceeding. If the Board prevails in the administrative hearing process and any appellate court proceedings, it shall recover all costs and charges, which are included in the final order or judgment, excluding attorneys' fees. Upon payment of such costs and charges by the person protesting the award, the bond shall be returned to him/her. If the person protesting the award prevails, the bond shall be returned to that person and s/he shall recover from the Board the costs and charges which are included in the final order or judgment, excluding attorneys' fees.
- C. **Bond: Construction Purchasing –** Construction purchasing is separately governed by Board policy, and persons protesting competitive procurement related to educational facilities shall be required to post a bond in the amount specified in F.S. 255.0516, which also governs recovery of fees and costs including attorneys' fees.
- D. **Staying the Procurement Process –** Upon timely receipt of the formal written protest petition, and posting of the bond, the solicitation or contract award process shall be stayed until the protest is resolved by final agency action, unless the Board sets forth, in writing, particular facts and circumstances which require the continuance of the solicitation or contract award process in order to avoid an immediate and serious danger to the public health, safety, and welfare.

Any person who is adversely affected by the Board's decision or intended decision, shall file a Notice of Protest in writing with the Clerk of the Board, who shall maintain an office in the Board Administration building, within seventy-two (72) hours after the posting of the bid tabulation or after receipt of the notice of the Board's decision or intended decision and shall file a Formal Written Protest within ten (10) calendar days after filing the Notice of Protest. The protesting bidder shall also be required to post a bond, consistent with this rule. Failure to file a Notice of Protest or failure to file a Formal Written Protest shall constitute a waiver of proceedings under F.S. Chapter 120.57. The formal written protest shall state with particularity the facts and law upon which the protest is based. Saturdays, Sundays, and legal holidays shall be excluded in the computation of the seventy-two (72) hour time period provided by this paragraph.

The Formal Written Protest will be reviewed by Procurement Management Services, who will offer the protesting bidder the opportunity to meet and discuss the merits of the protest. If the protest is not resolved, the matter may be referred for proceedings, pursuant to F.S. 120.569 and 120.57. Petitions for hearing on protests pursuant to F.S. 120.569 and 120.57 must be filed in accordance with Board Bylaw 0133 on quasi-judicial proceedings.

Upon receipt, the Board Clerk shall forward a copy of any Notice of Protest to the Board. After a Notice of Protest is filed, the Clerk shall notify the Board upon receipt of a Formal Written Protest, and shall also notify the Board if no Formal Written Protest is submitted after the statutory time period for filing a Formal Written Protest has elapsed. The Clerk will inform the Board of the final resolution of any Formal Written Protest, regardless of whether the resolution involved a formal administrative hearing. If the resolution involved a formal administrative hearing, the Board will be informed of the results in accordance with Policy 0133, Quasi-Judicial Proceedings.

Receiving and Opening of Bids

The Superintendent, or an administrator designated by the Superintendent, shall designate the time and place for receiving and opening of bids.

- A. Bids are to be submitted to Procurement Management Services or electronically up to the time and on the date specified in the bid documents. Bids received after the date and hour specified in the bid documents will not be considered.
- B. At least two (2) Procurement Management Services staff will be assigned to facilitate the public bid opening.
- C. All bids will be recorded at the time they are received, showing the bid number, bid title, and the names of the bidders submitting bid forms. Notification of timely receipt shall be confirmed by the bid opening minutes and submitted to the Board at the next regularly scheduled Board meeting.

The above guidelines for receiving bids do not apply to the awarding of bids at Board meetings.

The Recording or Tabulation of Purchasing Bids

The names of bidders, the prices submitted, and such other pertinent data, will be electronically available or entered on a tabulation sheet by Procurement Management Services. This information shall be available as set forth in F.S. 119.07.

Rejection of Bids

The right to reject any and all bids is reserved by the Board and such reservation shall be indicated in all advertising and invitations. When bids are rejected and the project or requirement is not abandoned, new bids may be issued. Bids which contain any alterations or erasures may be rejected. Bids will be rejected for good and sufficient cause, such as faulty specifications, excessive cost, and abandonment of the requirements, insufficient funds, or other irregularities. Bids may be rejected for failure by the bidder to comply with any requirement stated in the bid document, the bid proposal form, or any attachments which become part of the bid.

Irregular or Deviating Bids

In the event that Procurement Management Services wishes to make a recommendation of an award of a bid to a bidder who has deviated from specifications, or in which there is any irregularity, the report recommending such an award should contain in detail: the manner in which the bid deviates from the specifications or is irregular, the reasons for the recommendation of the award, and approval by the Board Attorney.

Award Recommendation

Notice of Intended Action will be posted on the District's website for Procurement bids no later than the Friday preceding the week when the award is scheduled to be made by the Board or Superintendent.

Official Award Date

Awards become official when made, unless otherwise specified in the award recommendation.

Contract Renewals

The Board shall have the authority to award bids and reject any or all bids. The Superintendent shall have the authority to exercise, in subsequent years, any renewal options included in a bid solicitation, provided terms and conditions are favorable for the School District and subject to the availability of funds.

Legal Basis for Procedures

The procedures for the purchase of commodities and services, and construction of facilities for the District shall comply with the Florida statutes and the Florida Administrative Code.

Bidding

It is the policy of the Board that the Superintendent shall be responsible for estimating needs for items in common use and making quantity purchases. All items, or group of related items that cost in excess of the amount defined in F.A.C. 6A-1.012(6), shall be purchased based on competitive bids, except as otherwise authorized by Florida statutes and/or Florida Administrative Code.

Identical Prices/Points--Priorities for Award

When identical prices/points are received from two (2) or more vendors/firms and all other factors are equal, priority for award shall be given to vendors/firms in the following sequence:

- A. A business that certifies that it has implemented a drug-free work place program shall be given preference in accordance with the provisions of F.S. 287.087;
- B. Local vendor as defined by Board Policy [6320.05](#);
- C. Certified service-disabled Veteran business;
- D. A certified Minority/Women Business Enterprise vendor;
- E. The Miami-Dade County SBE/Micro/Minority/Women Business Enterprise vendor;

- F. The Broward, Palm Beach or Monroe County SBE/Micro/Minority/Women Business Enterprise vendor;
- G. The Broward, Palm Beach or Monroe County vendor, other than the SBE/Micro/Minority/Women Business Enterprise vendor;
- H. The Florida vendor who is a SBE/Micro/Minority/Women Business Enterprise vendor;
- I. The Florida vendor, other than a Minority/Women Business Enterprise vendor;
- J. The Minority/Women Business Enterprise vendor, who, because of lower prices, receives a larger dollar award for other items; and
- K. The SBE/Micro/non-Minority/Women Business Enterprise vendor who, because of lower prices, receives a larger dollar award for other items.

In accordance with Florida law, local preference shall not be applied to competitive solicitations for construction services in which fifty percent (50%) or more of the cost will be paid from state-appropriated funds which have been appropriated at the time of the competitive solicitation. The solicitation documents for construction services in this event must disclose that no local preference consideration will be applied.

If application of the above criteria does not indicate a priority for award or cannot be applied by law, Board administration shall determine if the award is capable of being split, and, if the vendors will agree to split the award. If the award cannot be split, or the vendors do not agree to split the award, the award will be decided by the toss of a coin. The toss of a coin shall be held publicly, with the tie low bid vendors invited to be present as witnesses and participants. The Chief Procurement Officer or a staff member from the Office of Procurement Management will preside over the coin toss and a member from Internal Audits will observe.

Vendor Preference for Certified Service-Disabled Veteran Business Enterprises

The Board provides a vendor preference for certified service disabled veteran businesses in accordance with Board Policy [6320.02](#) and State law.

In assessing priorities for award, when identical prices are received from two (2) or more vendors and all other factors are equal, priority for award shall be given to a certified service-disabled veteran business enterprise as defined by F.S. 295.187 and Policy [6320.02](#). In the event there are two (2) or more certified-disabled veteran business enterprises entitled to the preference, then the award shall be given to the business having the smallest net worth.

The vendor preference for certified service-disabled veteran businesses shall be subordinate only to the vendor preference for businesses implementing a drug-free workplace.

The Board's goal for participation by service disabled veteran business enterprises shall be established at three percent (3%) of the total value of all prime contract/subcontract awards for each fiscal year.

Performance and Payment Security, Default and Bonding Company Qualifications

- A. Performance Security on Construction Bids and Awards

1. Bid bond of five percent (5%) of the total bid amount is required.
2. In order to encourage participation in construction, remodeling, and renovation projects by small, woman owned, and minority owned businesses, at the option of the Board, no bid security or performance or payment bond shall be required for bids in an amount less than \$200,000.
3. Bid awards exceeding \$200,000 require a 100% performance and payment security of the award amount. For construction projects costing \$200,000 or more, the accepted bidder must deliver performance and payment bonds equal to the contract price, no later than twenty (20) days after the date of award of the contract or Approval of the Guaranteed Maximum Price (GMP) Amendment by the Board. Bonds must be issued by surety companies admitted to do business in the State of Florida and listed in the Federal Register of the U.S. Department of Treasury for Surety Companies Acceptable on Federal Bonds.

Bid security shall be a certified check, cashier's check, Treasurer's check, bank draft, or bid bond acceptable to the Board in a form and manner that is acceptable to the Board.

Should the accepted bidder fail to furnish performance and materials and payment bonds, the amount of the bid security may be forfeited to the District.

B. Performance Security on Awards Other than Construction

1. Bid awards of \$200,000 or less shall be exempt from performance and payment security.
2. Performance security shall not be required unless otherwise defined in the bid specification. Performance security shall equal 100% of the award amount.

C. Bonding Company Qualifications

Bonds shall be written through a reputable and responsible surety bond agency licensed to do business in the State of Florida and with a surety company or corporation meeting both of the following specifications:

1. Awards Greater than \$500,000
 - a. A minimum rating in the latest revision of Best's Insurance Reports of:

Contract Amount	Minimum Rating by A.M. Best
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\$200,000.00 to \$5,000,000	A, No Minimum Class
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\$5,000,000.01 to \$10,000,000	A, Class IV
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\$10,000,000.01 or more	A, Class V
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- b. Current certificate of authority as acceptable surety on Federal Bonds in accordance with the latest edition of the United States Treasury Department Circular 570 entitled "Companies Holding Certificates of Authority as Acceptable Sureties on Federal Bonds and as Acceptable Reinsuring Companies" and shall be accepted for an amount not exceeding the underwriting limitation thereon.

2. Awards of \$500,000 or less

Bonds shall be written with a surety company or corporation meeting the qualifications as set forth in Paragraph A.2 above or the qualifications set forth in F.S. 287.0935.

Vendor Performance

Upon award of all bids and contracts, vendor performance shall be documented by the originating department. Periodically, procurement staff and the originating department shall review and discuss awarded vendors' performance, per the terms and conditions of the bid or contract, including the spend analysis.

Should the vendor be identified with poor performance, procurement staff and the originating department shall notify the vendor to cure the bid or contract deficiency, within a stated timeframe.

Suspension or Default by Vendor

Board Policy [6320.04](#), Contractor Discipline, governs debarment, suspension, and other disciplinary action that may be taken by the Board against contractors that violate law and Board policies.

Contractors may be suspended and/or debarred from doing business with the Board or otherwise disciplined. Suspension and debarment are serious sanctions that may only be imposed when it is in the best interest of the Board and to protect the public.

The Superintendent is authorized to develop and implement disciplinary procedures that comply with State and Federal laws, ordinances, codes, regulations, and Policy [6320.04](#).

Bid or Contract Close-Out Period

Procurement staff and the originating department shall notify the vendor of the termination of the bid or contract services, within a reasonable time, requesting any pending reports, documents, data or property generated using district funds during the contract period or invoices to be submitted.

Signatures of Superintendent and Designees on Contracts

The Board authorizes the use of signatures of the Superintendent and his/her designees on behalf of the Board on all contracts, agreements, and documents where a signature of the Chair is not required by law or regulation of the Department of Education. All contracts, agreements, and documents must be based upon approvals previously adopted and spread upon the minutes of the Board, unless exempted by Board policy. Each contract shall demonstrate its procurement authority.

Purchasing Cards (PCards)

Pursuant to Board Policy [6424](#), purchasing cards may be used to make small dollar purchases and acquire materials and supplies as needed for operations.

Purchasing cards shall not be used to circumvent the general purchasing procedures established by State law and Board policy. Purchasing cards shall only be used for expenses in connection with Board-approved or school-related activities, that benefit the District and serve a valid and proper public purpose. Periodically, procurement staff shall review the PCard expenditures to ensure compliance with Board policies and the purchasing threshold requirements.

Purchasing Principles

Employees shall be guided by the following principles and standards adopted by the National Institute of Governmental Purchasing (NIGP):

- A. Accountability: taking ownership and being responsible to stakeholders for our actions, essential to preserve the public trust and protect the public interest.
- B. Ethics: acting in a manner true to these values, essential to preserve the public's trust.
- C. Impartiality: unbiased decision-making and action, essential to ensure fairness for the public good.
- D. Professionalism: upholding high standards of job performance and ethical behavior, essential to balance diverse public interests.
- E. Service: obligation to assist stakeholders, essential to support the public good.
- F. Transparency: easily accessible and understandable policies and processes, essential to demonstrate responsible use of public funds.

Ethics training on ethical standards that are no lower than those prescribed by the State shall be provided to all employees involved in procurement activities for the Board.

Complaints alleging discrimination against any commercial enterprise doing business with the Board must be filed and will be investigated and addressed in accordance with Board Policy [6465](#).

F.S. 119.07
F.S. 120.569
F.S. 120.57
F.S. 120.57(3)
F.S. 255.0516
F.S. 255.065
F.S. 255.099
F.S. 255.0991
F.S. 255.25(3)(c)
F.S. 282.041(15)
F.S. 286.0113(2)(b)(1)
F.S. 287.017
F.S. 287.042(2)(c)
F.S. 287.056
F.S. 1001.41(1)(2)
F.S. 1001.42(12)(j)
F.S. 1001.42(26)
F.S. 1001.43(10)
F.S. 1006.27
F.S. 1010.04(2)
F.S. 1010.04(4)(a)
F.A.C. 6A-1.012
F.A.C. 6A-1.091
F.A.C. 6A-7.0411(2)(i)
F.A.C. 28-110.005(2)

Revised 8/7/13
Revised 11/19/14
Revised 3/9/16
Revised 1/25/17
Revised 4/25/18
Revised 10/10/18
Revised 3/13/19

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Office of Superintendent of Schools
Board Meeting of September 7, 2016

August 24, 2016

Financial Services
Mrs. Judith M. Marte, Chief Financial Officer

**SUBJECT: AWARD INVITATION TO BID NO. ITB-15-086-YWP --
PROGRAM EVALUATION CONSULTANT SERVICES**

COMMITTEE: FISCAL ACCOUNTABILITY

**LINK TO STRATEGIC
BLUEPRINT: EFFECTIVE AND SUSTAINABLE BUSINESS PRACTICES**

Procurement Management Services, at the request of the Office of Academic and Transformation, released the above-referenced solicitation. The purpose of this Invitation To Bid (ITB) is to develop a pool of approved consultants to conduct needs assessments; develop evaluation plans and research designs; collect and analyze data; interpret results; and prepare recommendations and reports, on as-needed basis. As specific needs for evaluation projects arise, consultants will be matched with projects that require their specific skills and research experience and will be asked to respond to a Request for Quotation. This is a term bid which states that the Board may purchase services, as may be needed, but is not obligated to purchase any guaranteed amount. This ITB was advertised on the Procurement Management Services website, the Demandstar website, BidNet, Florida Bid, *The Miami Times* and the *Diario Las Americas* newspapers as well as emailed to 215 potential bidders.

The initial term of the bid shall be for a three (3) year period, commencing September 7, 2016 through September 6, 2019, and may, by mutual agreement between The School Board of Miami-Dade County, Florida, and the successful bidders, be extended for two (2) additional one (1) year periods.

Strategies were employed to increase SBE/MBE participation; however, the Goal Setting Committee recommended that this solicitation be open with a 5% aspirational local preference goal because a large number of SBE/MBE vendors were not identified within the commodity code(s).

Nineteen (19) vendors responded to this advertised bid. Based on the criteria listed in the solicitation, the contract is being awarded to nineteen (19) vendors, including one MBE.

Fund Source
420000 Grants

E-141

RECOMMENDED: That The School Board of Miami-Dade County, Florida:

1. **AWARD** Invitation To Bid No. ITB-15-086-YWP – PROGRAM EVALUATION CONSULTANT SERVICES, to develop a pool of approved consultants to conduct needs assessments; develop evaluation plans and research designs; collect and analyze data; interpret results; and prepare recommendations and reports, on an as-needed basis., with an effective date of September 7, 2016 through September 6, 2019, and may, by mutual agreement between The School Board of Miami-Dade County, Florida, and the successful bidder, be extended for two (2) additional one (1) year extension periods thereto, as follows:
 - a. ADELAIDE SERVICES, INC.
DBA ARROYO RESEARCH SERVICES
639 PENNSYLVANIA ROAD
ARDEN, NC 28704
OWNER/OFFICER: KIRK VANDERSALL, MANAGING DIRECTOR
 - b. ADVANCED RESEARCH CONSULTING, LLC.
1580 SWEETBAY WAY
HOLLYWOOD, FL 33019
OWNER/OFFICER: JEROME L LEVITT, MANAGING DIRECTOR
 - c. AMERICAN INSTITUTES FOR RESEARCH IN THE BEHAVIORAL SCIENCES
1000 THOMAS JEFFERSON STREET, NW
WASHINGTON, DC 20007
OWNER/OFFICER: NILVA DA SILVA, SENIOR CONTRACT OFFICER
 - d. CENTER FOR ASSESSMENT, STRATEGIC PLANNING, EVALUATION AND RESEARCH, LLC.
DBA CASPER
4110 NW 64TH STREET
GAINESVILLE, FLORIDA 32606
OWNER/OFFICER: CHARLES E. BYRD, PH.D. MANAGER
 - e. DR. DEB'S EDUCATION CONSULTING, LLC.
1630 ROYAL FOREST CT.
WEST PALM BEACH, FLORIDA 33406
OWNER/OFFICER: DR. DEBORAH MAZZEO, OWNER
 - f. ESCOFFERY CONSULTING COLLABORATIVE, INC.
7310 SW 96TH STREET
PINECREST, FLORIDA 33156
OWNER/OFFICER: LORNA ESCOFFERY, PRESIDENT

- g. EVERGREEN SOLUTIONS, LLC.
2878 REMINGTON GREEN CIRCLE
TALLAHASSEE, FLORIDA 32303
OWNER/OFFICER: DR. LINDA RECIO, PRESIDENT
- h. HEZEL ASSOCIATES, LLC.
731 JAMES STREET, SUITE 410
SYRACUSE, NY 13203
OWNER/OFFICER: KIRK KNESTIS, CEO
- i. LEONARD FONTANA AND ADELA BECKERMAN FONTANA,
INC.
4613 NORTH UNIVERSITY DRIVE, UNIT 429
CORAL SPRINGS, FLORIDA 33067
OWNER/OFFICER: DR. LEONARD FONTANA, INDEPENDENT
EVALUATOR
- j. MARZANO RESEARCH LABORATORY, LLC.
555 NORTH MORTON STREET
BLOOMINGTON, IN 47404
OWNER/OFFICER: JENNIFER S. NORFORD, VICE
PRESIDENT OF DEVELOPMENT AND INNOVATION
- k. MCREL INTERNATIONAL
4601 DTC BOULEVARD, SUITE 500
DENVER, CO 80237
OWNER/OFFICER: SUE DESCH, CHIEF FINANCIAL OFFICER
- l. MEASUREMENT INCORPORATED
423 MORRIS STREET
DURHAM, NC 27701
OWNER/OFFICER: THOMAS KELSH, VICE PRESIDENT
- m. PRISMATIC SERVICES, INCORPORATED
20460 CHARTWELL CENTER DRIVE, SUITE 1
CORNELIUS, NC 28031
OWNER/OFFICER: TATIA PRIETO, PRESIDENT
- n. Q-Q RESEARCH CONSULTANTS, LLC. **MBE**
1444 BISCAYNE BLVD., #115-24
MIAMI, FLORIDA 33132
OWNER/OFFICER: SANDRA WILLIAMS, PH.D., CEO
AFRICAN AMERICAN
- o. RMC RESEARCH CORPORATION
3550 BUSCHWOOD PARK DRIVE, SUITE 130
TAMPA, FLORIDA 33618
OWNER/OFFICER: TRUDY HENSLEY, VICE PRESIDENT

- p. THE CNA CORPORATION
3003 WASHINGTON BOULEVARD
ARLINGTON, VA 22201
OWNER/OFFICER: NICHOLAS W. HUNTER, DIRECTOR
 - q. THOMAS P. MILLER & ASSOCIATES, LLC.
1630 NORTH MERIDIAN STREET, SUITE 430
INDIANAPOLIS, IN 46202
OWNER/OFFICER: THOMAS MILLER, PRESIDENT & CEO
 - r. TRUSTEES OF INDIANA UNIVERSITY
(CENTER FOR EVALUATION AND EDUCATION POLICY)
509 EAST THIRD STREET
BLOOMINGTON, IN 47401-3654
OWNER/OFFICER: STEVEN A. MARTIN, ASSOCIATE VP FOR
RESEARCH ADMINISTRATION
 - s. WESTED
730 HARRISON STREET
SAN FRANCISCO, CA 94107
OWNER/OFFICER: VIRGILIO F. TRINO, JR. CONTRACTS
MANAGER
2. **AUTHORIZE** Procurement Management Services to obtain Request for Quotes from the preapproved vendors, up to the total estimated amount of \$2,000,000, for the initial contract term, and an amount not to exceed \$667,000, for each subsequent one (1) year extension period(s). Board authorization of this recommendation does not mean the amount shown will be expended.

JMM/ywp

Grant Availability Report

2014-15

Program Program Name and Number

Fund	Program	Funds Center	Commit ment item	Function	Original Budget	Transfers & Adjustments	Current Budget	YTD Encumbrances	Expenditures	Available Balance	Percent Budget Remaining	YTD Commitments	Adjusted Balance
420000			513600 IN-SERVICE REIMBURSE	640000		0.00	0.00		0.00	0.00	0.0		0.00
420000			515000 HOURLY EMPLOYEE	510000		14,827.24	14,827.24		16,020.66	-1,193.42	0.0		-1,193.42
420000			515000 HOURLY EMPLOYEE	780000		2,088.00	2,088.00	0.00	261.80	1,826.20	87.5		1,826.20
420000			515000 HOURLY EMPLOYEE	790000		3,913.61	3,913.61	0.00	-3,948.82	7,862.43	200.9		7,862.43
420000			521000 RETIREMENT	510000		2,889.18	2,889.18		269.02	2,620.16	90.7		2,620.16
420000			521000 RETIREMENT	780000		161.00	161.00		0.00	161.00	100.0		161.00
420000			521000 RETIREMENT	790000		427.29	427.29		-322.60	749.89	175.5		749.89
420000			522000 SOCIAL SECURITY	510000		95.38	95.38		856.99	-761.61	0.0		-761.61
420000			522000 SOCIAL SECURITY	640000		41.90	41.90		-26.47	68.37	163.2		68.37
420000			522000 SOCIAL SECURITY	780000		129.00	129.00	0.00	16.23	112.77	87.4		112.77
420000			522000 SOCIAL SECURITY	790000		226.95	226.95	0.00	-270.63	497.58	219.2		497.58
420000			522100 MEDICARE	510000		22.03	22.03		200.43	-178.40	0.0		-178.40
420000			522100 MEDICARE	640000		8.74	8.74		-8.19	14.93	170.8		14.93
420000			522100 MEDICARE	780000		30.00	30.00	0.00	3.79	26.21	87.4		26.21
420000			522100 MEDICARE	790000		62.66	62.66	0.00	-63.29	115.95	220.2		115.95
420000			524000 WORKERS COMP & LIAB	510000		5,271.00	5,271.00			5,271.00	100.0		5,271.00
420000			524000 WORKERS COMP & LIAB	640000		135.00	135.00			135.00	100.0		135.00
420000			524000 WORKERS COMP & LIAB	780000		59.00	59.00			59.00	100.0		59.00
420000			524000 WORKERS COMP & LIAB	790000		509.00	509.00			509.00	100.0		509.00
420000			524300 WC & LIAB DISTR OF	510000		-4,818.55	-4,818.55		482.13	-5,300.68	0.0		-5,300.68
420000			524300 WC & LIAB DISTR OF	640000		-61.82	-61.82		72.54	-134.36	0.0		-134.36
420000			524300 WC & LIAB DISTR OF	780000		0.00	0.00	0.00	7.36	-7.36	0.0		-7.36
420000			524300 WC & LIAB DISTR OF	790000		-398.61	-398.61	0.00	-110.96	-287.65	0.0		-287.65
420000			Result			25,608.00	25,608.00	0.00	13,441.99	12,166.01	47.5		12,166.01
420000			531000 PROFESSIONAL & TECHN	510000		0.00	0.00			0.00	0.0		0.00
420000			531000 PROFESSIONAL & TECHN	771000		9,346.00	9,346.00	0.00	9,346.00	0.00	0.0		0.00
420000			533100 TRAVEL OUT OF COUNTY	640000		2,226.72	2,226.72	325.51		1,900.21	85.4		1,900.21
420000			533200 FIELD TRIPS	780000		10,129.00	10,129.00	308.00	935.00	8,886.00	87.7		8,886.00
420000			539000 OTHER PURCHASED SERV	510000		4,770.00	4,770.00	0.00	3,395.00	1,375.00	28.8		1,375.00
420000			551000 SUPPLIES	510000		30,613.42	30,613.42	3,184.86	80.84	27,347.72	89.3		27,347.72
420000			564000 FURNITURE, FIXTURES	510000		74,067.00	74,067.00			74,067.00	100.0		74,067.00
420000			564100 CAP. FFE (NON-COMPUT	510000		0.00	0.00	0.00	1,302.05	-1,302.05	0.0		-1,302.05
420000			564200 NON-CAP FFE(NON-COMP	510000		-1,572.50	-1,572.50	7,674.24	21,747.52	-30,994.26	0.0		-30,994.26
420000			564400 NON-CAP COMP & PERIP	510000		-23,748.00	-23,748.00	0.00	4,540.00	-28,288.00	0.0		-28,288.00
420000			Result			105,830.64	105,830.64	11,492.61	41,346.41	52,991.62	50.1		52,991.62
420000						131,438.64	131,438.64	11,492.61	54,788.40	65,157.63	49.6		65,157.63
420000			579200 INDIRECT COST	720000		4,450.51	4,450.51	0.00	29.71	4,420.80	99.3		4,420.80
420000			Result			4,450.51	4,450.51	0.00	29.71	4,420.80	99.3		4,420.80
420000						4,450.51	4,450.51	0.00	29.71	4,420.80	99.3		4,420.80
420000		Result				136,889.15	136,889.15	11,492.61	54,818.11	69,578.43	51.2		69,578.43
						543,556.60	543,556.60	45,970.44	219,272.44	278,313.72	2,890.38	0.00	278,313.72

Cliff Report

SAP Grant Number	Fund	Program	Sponsored Class	Description	Location	Function	Contract Number	Budget Amount	Commitment Amount	Encumbrance Amount	Total Expenditure	Balance Amount
75000261	420000	47900000	E514400	TEACHER Payments	1960000	530000		12,804.00	0.00	0.00	12,804.00	0.00
75000261	420000	47900000	E514900	TEMPORARY INSTRUCTOR	1960000	530000		1,800.00	0.00	0.00	0.00	1,800.00
75000261	420000	47900000	E515000	HOURLY EMPLOYEE	1960000	530000		14,700.00	0.00	0.00	14,700.00	0.00
75000261	420000	47900000	E521000	RETIREMENT	1960000	530000		2,686.00	0.00	0.00	2,313.22	372.78
75000261	420000	47900000	E522000	SOCIAL SECURITY	1960000	530000		1,724.00	0.00	0.00	1,705.40	18.60
75000261	420000	47900000	E522100	MEDICARE	1960000	530000		404.00	0.00	0.00	399.15	4.85
75000261	420000	47900000	E524000	WORKERS COMP & LIAB INS	1960000	530000		793.00	0.00	0.00	0.00	793.00
75000261	420000	47900000	E524300	W/C & LIAB DISTR OF CHRGS	1960000	530000		0.00	0.00	0.00	756.02	-756.02
75000261	420000	47900000	E533200	Field Trips	1960000	780000		2,000.00	0.00	0.00	1,190.00	810.00
75000261	420000	47900000	E539900	Printing-Duplicating	1960000	530000		8,000.00	0.00	0.00	6,000.00	2,000.00
75000261	420000	47900000	E551000	Supplies	1960000	530000		17,544.00	0.00	0.00	18,005.75	-461.75
75000261	420000	47900000	E552000	Textbooks	1960000	530000		5,508.00	0.00	0.00	5,472.00	36.00
75000261	420000	47900000	E573000	Dues And Fees	1960000	530000		14,110.00	0.00	0.00	12,618.60	1,491.40
75000261	420000	47900000	E579200	Indirect Cost	1990400	720000		3,246.00	0.00	0.00	1,524.47	1,721.53
								85,319.00	0.00	0.00	77,488.61	7,830.39

Payroll Distribution Report 2014-15

Fiscal year	Fiscal Period	For Period	In Period	Payment Date	Employee Name	Base Daily Rate	Total Hourly Rate	Position	Job	Funds Center	Fund	G/L Account	Program	Function	Number of hours	Amount
2015	1	201414	201414	07/11/2014		USD 0.00	USD 24.00				420000	515000	HOURLY EMPLOYEE	510000	25.30	607.20
2015	1	201414	201414	07/11/2014		USD 202.38	USD 27.13				420000	513600	IN-SERVICE REIMBURSE	640000	0.00	400.00
2015	1	201414	201414	07/11/2014		USD 331.73	USD 41.47				420000	513600	IN-SERVICE REIMBURSE	640000	0.00	300.00
2015	1	201414	201414	07/11/2014		USD 256.84	USD 33.94				420000	513600	IN-SERVICE REIMBURSE	640000	0.00	100.00
2015	1	201414	201414	07/11/2014		USD 196.59	USD 26.41				420000	513600	IN-SERVICE REIMBURSE	640000	0.00	100.00
2015	1	201414	201414	07/11/2014		USD 203.85	USD 28.52				420000	513600	IN-SERVICE REIMBURSE	640000	0.00	100.00
2015	1	201414	201414	07/11/2014		USD 91.51	USD 11.44				420000	515000	HOURLY EMPLOYEE	510000	34.00	388.96
2015	1	201414	201414	07/11/2014		USD 194.89	USD 26.19				420000	513600	IN-SERVICE REIMBURSE	640000	0.00	100.00
2015	1	201414	201414	07/11/2014		USD 194.89	USD 24.37				420000	513600	IN-SERVICE REIMBURSE	640000	0.00	300.00
2015	1	201414	201414	07/11/2014		USD 194.82	USD 24.36				420000	513600	IN-SERVICE REIMBURSE	640000	0.00	100.00
2015	1	201414	201414	07/11/2014		USD 78.20	USD 9.78				420000	515000	HOURLY EMPLOYEE	510000	31.00	303.18
2015	1	201414	201414	07/11/2014		USD 0.00	USD 29.39				420000	515000	HOURLY EMPLOYEE	510000	40.00	587.80
2015	1	201414	201414	07/11/2014		USD 0.00	USD 29.39				420000	515000	HOURLY EMPLOYEE	510000	60.00	881.70
2015	1	201414	201414	07/11/2014		USD 0.00	USD 29.72				420000	515000	HOURLY EMPLOYEE	510000	60.00	891.60
2015	1	201414	201414	07/11/2014		USD 0.00	USD 29.72				420000	515000	HOURLY EMPLOYEE	510000	60.00	891.60
															285.00	6,444.84

Time and Effort Report

2014 A-87 PERIDO #3 - SINGLE COST OBJECTIVE

Person ID	Personnel Number	Period	Name of employee or applicant	Position	Cost Center	Fund	Functional Area	Program Name	Grant	Catalog of Federal Domestic Assistance	G/L Account	G/L Account Text	Certification Type	Hours Worked	Days Worked	Supplement Paid	Amount
		3		99999999		420000					515000	HOURLY EMPLOYEE	Current	185.00	N/A	N/A	N/A
		3		99999999		420000					515000	HOURLY EMPLOYEE	Current	324.70	N/A	N/A	N/A
		3		99999999		420000					515000	HOURLY EMPLOYEE	Current	355.00	N/A	N/A	N/A
		3		99999999		420000					513600	IN-SERVICE REIMBURSE	Current	N/A	N/A	N/A	100.00
		3		99999999		420000					515000	HOURLY EMPLOYEE	Current	150.00	N/A	N/A	N/A
		3		99999999		420000					513600	IN-SERVICE REIMBURSE	Current	N/A	N/A	N/A	100.00
		3		53277104		420000					515000	HOURLY EMPLOYEE	Current	50.50	N/A	N/A	N/A
		3		99999999		420000					515000	HOURLY EMPLOYEE	Current	33.50	N/A	N/A	N/A
		3		99999999		420000					513600	IN-SERVICE REIMBURSE	Current	N/A	N/A	N/A	100.00
		3		53269639		420000					514500	PARAPROFESSIONAL	Current	N/A	81.00	191.16	N/A
		3		99999999		420000					515000	HOURLY EMPLOYEE	Current	136.00	N/A	N/A	N/A
		3		99999999		420000					515000	HOURLY EMPLOYEE	Current	94.00	N/A	N/A	N/A
		3		53003015		420000					514400	TEACHER	Current	N/A	81.00	196.83	N/A
		3		53287295		420000					515000	HOURLY EMPLOYEE	Current	108.50	N/A	N/A	N/A
		3		99999999		420000					515000	HOURLY EMPLOYEE	Current	94.50	N/A	N/A	N/A
		3		99999999		420000					513600	IN-SERVICE REIMBURSE	Current	N/A	N/A	N/A	100.00
		3		99999999		420000					515000	HOURLY EMPLOYEE	Current	157.60	N/A	N/A	N/A
		3		53017676		420000					514500	PARAPROFESSIONAL	Current	N/A	81.00	903.98	N/A
		3		53296608		420000					515000	HOURLY EMPLOYEE	Current	191.00	N/A	N/A	N/A
		3		53287296		420000					515000	HOURLY EMPLOYEE	Current	40.50	N/A	N/A	N/A
		3		53269638		420000					514500	PARAPROFESSIONAL	Current	N/A	81.00	911.26	N/A
		3		53287297		420000					515000	HOURLY EMPLOYEE	Current	326.30	N/A	N/A	N/A
		3		53007142		434000					513600	IN-SERVICE REIMBURSE	Current	N/A	N/A	N/A	800.00
		3		99999999		420000					515000	HOURLY EMPLOYEE	Current	102.00	N/A	N/A	N/A
		3		99999999		420000					513600	IN-SERVICE REIMBURSE	Current	N/A	N/A	N/A	100.00
		3		53286833		420000					515000	HOURLY EMPLOYEE	Current	274.50	N/A	N/A	N/A
		3		53238788		420000					513600	IN-SERVICE REIMBURSE	Current	N/A	N/A	N/A	100.00
		3		53287295		420000					515000	HOURLY EMPLOYEE	Current	45.00	N/A	N/A	N/A
		3		53270491		420000					514400	TEACHER	Current	N/A	81.00	230.04	N/A
		3		53287295		420000					515000	HOURLY EMPLOYEE	Current	116.60	N/A	N/A	N/A
		3		99999999		420000					515000	HOURLY EMPLOYEE	Current	107.50	N/A	N/A	N/A
		3		99999999		420000					515000	HOURLY EMPLOYEE	Current	12.00	N/A	N/A	N/A
		3		99999999		420000					515000	HOURLY EMPLOYEE	Current	56.50	N/A	N/A	N/A
		3		99999999		420000					513600	IN-SERVICE REIMBURSE	Current	N/A	N/A	N/A	100.00