



AWARD AGREEMENT Spring 2022

Recipient Name:
School/Department Name:
School/Department Principal/Director:
Project Name:
Amount: \$
Annual Evaluation Due: May 31, 2023

STEPS REQUIRED FOR IMPLEMENTATION OF YOUR GRANT

- Step 1. The grant award check should be presented to your bookkeeper within 24 hours of receiving it. The bookkeeper will create an activity fund specifically for your grant. The check will be deposited into your activity fund account. Please provide your bookkeeper with a copy of the grant application (including approved budget breakdown) and this Award Agreement for their audit files.
- Step 2. Funding shall only be used for expenditures approved in your grant application/budget breakdown. Expenditures **must** follow approved Activity Fund guidelines, which includes utilizing approved APS Vendors only. Please see your bookkeeper for an updated vendor list and guidelines. Items purchased are to be kept and maintained at the school. Grant monies and grant purchased items may not be transferred to a different school or site, unless otherwise approved by the Foundation.
- Step 3. At the end of the grant period, you will be required to submit a Grant Evaluation Report. The Grant Evaluation Report must include a final Reconciliation Activity Account Report from your bookkeeper. You will also be asked to submit your timesheets if your grant included funding for stipends. A reminder to submit your report will be sent via email; a link to the Foundation website to submit required information will also be provided.
- Step 4. Under extenuating circumstances, an extension may be granted by the Foundation.
- Step 5. Please contact the Foundation if experiencing challenges in completing the approved project and/or if change in key personnel, bookkeeper, or school leadership.

I have read and understand that I am responsible for the management of grant funds received and, as such, must ensure that all expenses charged are accurate and allowable.

Recipient Name (Please Print)

Signature

Date

Principal/Department Administrator Name (Please Print)

Signature

Date

Bookkeeper Name (Please Print)

Date

Bookkeeper Signature

Date



Remaining Funds Policy

Grantees are expected to submit an annual evaluation form by May 31st. For multi-year awards, grantees will submit an evaluation form in May, then a final evaluation report the following year.

Fall grantees: Due the May 31st after their grant is received.

Spring grantees: Due the May 31st of the following year after their grant is received.

Annual evaluation reports are mandatory. The reports allow us to report to donors on the impact of their investment. Without proper reporting, we could not raise funds and could not disburse grants. Evaluation reports are collected using online forms, and each has a specific link for the grantee.

If a grantee has remaining funds of over \$50 when their evaluation is due, they have two options.

- Grantees may request a rollover of funds only. In cases where the project/program has been implemented, but there remains a balance of over \$50, they can request a rollover. This allows the grantee to spend the remaining funds during the next school year on the project/program. The grantee must still submit an evaluation report to be approved for a rollover, and must submit a final budget and Reconciliation Activity Account Report the following May.
- Grantees may request both a rollover of funds and an extension. In cases where the grantee cannot complete the implementation of their project/program and there remains a balance of over \$50, they can request an extension with a rollover. This allows the grantee to spend the remaining funds and implement the project/program as intended. The grantee must still submit an evaluation report to be approved, and must submit a final evaluation, budget and Reconciliation Activity Account Report the following May.

Timeline and Process

1. The Grants Manager will send notices to grantees in mid-April with links to their evaluation forms via email. Grantees must submit their evaluation forms online. ***Please note:*** If a grantee is no longer the project/program lead, a co-applicant, a new project/program lead or the principal or direct supervisor is expected to submit the evaluation online.
2. The Grants Manager will send a second notice via email to grantees who have not completed their evaluation forms a week before their deadline of May 31st. This also

serves as the last opportunity for grantees to request an extension and/or rollover when they submit their evaluation.

3. The week after the deadline, grantees who have not submitted their evaluation form will be sent a notice and their principal or direct supervisor will be copied on the email.
4. Starting in mid-June, the Grants Manager and Business Manager will contact bookkeepers and Activities Funds Specialists directly to acquire Reconciliation Activity Account Reports from grantees that have not submitted an evaluation form.
5. A final notice to grantees and their principals or direct supervisors will be sent before June 30th. The purpose is to acquire an evaluation.
6. If June 30th passes and the Foundation has not received an evaluation, a request will be made to have any remaining funds returned to the Foundation via check. The grantee will be ineligible from applying to an APS Education Foundation grant for one full year.

Please note: It is very rare that grantees do not submit their evaluations and funds must be returned to the Foundation. The Foundation staff are ready and willing to work with grantees to ensure that their approved project/program will be implemented. The most important aspect of this policy is communication. If there are any obstacles during the grant implementation or reporting process, please contact the Grants Manager.