



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

Maryland State Department of Education

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

June 22, 2023

Agenda

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

State-Aided Institutions (SAI) [webpage](#)

Overview

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

Changes

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

Timeline

Fiscal year
2023 ends
June 30

Final reports
are due

Fiscal year
2024 begins
July 1, 2023

Sign grant
agreement

Midyear report
due

Fiscal year
2024 ends
June 30, 2024

Final reports
are due

Fiscal year
2025 begins
July 1

Sign grant
agreement

Reporting Requirements

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

Grant Agreement

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

Midyear Report

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

**MARYLAND STATE DEPARTMENT OF EDUCATION
INTERIM PROGRESS REPORT**

Grant Name	State-Aided Institutions (SAI) Program, FY 2024	Grant Recipient Name	Institution Name
MSDE Grant #	123456	Recipient Grant #	123456
MSDE Project Manager	Nicole Obregon	Recipient Project Manager	Point of Contact
Fund Source Code		Grant Period	July 1, 2023 June 30, 2024
			From To

Section I: ATTACH ADDITIONAL SHEETS IF NEEDED

1. Explain grant activities that have taken place during the reporting period. What milestones have been met? What milestones have not been achieved? Have staff been hired according to schedule?
2. Are the goals and objectives expected to be achieved by the end of the grant period? Yes No
3. Are grant timelines being adhered to? Yes No
 If not, explain and discuss the impact on grant outcomes.
4. How much of the budget has been expended to date? \$ or %
5. Is spending consistent with budget projections? Yes No
 If not, what steps are being taken to expend the funds as planned?

Invoice Schedule

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

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

Invoices

123 College Rd. Westminster, MD 21157

Contact: Name
 Email: name@mcdaniel.edu
 Phone: 410-123-456

INVOICE # 001
 DATE: 1/15/2023

BILL TO:
 Maryland State Department of Education
 200 West Baltimore Street
 Baltimore, Maryland 21201

NOGA # 123456

DESCRIPTION	TOTAL
Salaries & wages	2691.23
Grant Director salary	
Program Coordinator salary	1967.55
Contracted services	
Educator stipends for 3 educators	1,500.00
Supplies & materials	
Student swamp boots (15 pairs)	750.00
Other charges	
Creation of digital flyers	250.00
Total invoiced:	7,158.78

Sample Signature

Signature of Financial Representative

Institution letterhead

Invoice #

Date

Grant number

MSDE budget categories

Expenses aligned to your approved budget

Signed by institution

Total being invoiced

Site Visits: Programmatic

To be compliant with [COMAR 13A.05.13.03 Program Qualifications](#), MSDE collects responses to the following questions:

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

Site Visits: Fiscal

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

Final Reports

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

**MARYLAND STATE DEPARTMENT OF EDUCATION
FINAL REPORT**

Grant Name	State-Aided Institutions (SAI) Program, FY 2024	Grant Recipient Name	Institution Name
MSDE Grant #	123456	Recipient Grant #	123456
MSDE Project Manager	Nicole Obregon	Recipient Project Manager	Point of Contact
Fund Source Code		Grant Period	07/01/23 08/30/24
			From To

Section I: ATTACH ADDITIONAL SHEETS IF NEEDED

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

Attach a narrative response in a word document. Attach documentation (spread sheets, tables, etc.) that show all aspects of how the scope of work has been met.

2. Have all grant funds been spent or obligated at the end of the grant period? Yes No

3. If the answer to Question #2 is no, please explain any balances.

If no, record response in word document.

4. When will the balance be remitted to MSDE? Date:

If the balance is not sent to MSDE before the final AFR is filed, the funds must be returned with the AFR.

Questions?

Contact:

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