

## PROJECT OFFICER'S MEETING

Monday, August 1, 2016

11:15 a.m. – 12:00 p.m.

### Purpose

- Annual meeting with Project Directors to ensure high-quality grant performance.
- Share critical information and respond to grantee questions.

### 1. Welcome/ Share Project Highlights

### 2. Grant Information, Management, and Accountability

- **Email correspondence.** Enter your grant award # and subject of the message in the subject line on all emails to the Department. All communication and grant documents are now saved in an electronic file system.
- **Project staff availability.** If your grant is staffed during the summer months, project staff should be available.
- **Attendance at the Project Directors' Conference** is a grant requirement.
- **Program performance measures** are listed in the application package, the continuation packages, and results are reviewed each year at the Project Directors' Conference. Performance on these program measures are reported annually to Congress in the U. S. Department of Education's Budget Justification for the next fiscal year.
- **Annual Performance Reports (APRs).** APRs are typically due in April and May. The end of the reporting period is the last day of February. You should receive an automated message in January from OSEP with instructions and forms for completing the APR and submitting in G5. The cover page should be signed and uploaded with the APR in G5. A grant performance report should be on file with the Department every 12 months.
- **APR training.** Training webinars that define expectations for completing the APRs are posted on the <https://www.osepideasthatwork.org/> website, under the heading "Resources for Grantees" and then, "Program Areas." In addition, conference calls will be scheduled in early spring to review reporting requirements.

- **Timely Submission.** According to 34 CFR 75.253(a)(3), the timely submission of this report is one of the factors that the Secretary will consider in determining whether to continue your project's funding for the next fiscal year.
- **Large Remaining Balances.** Continuation funding is not automatic and may be reduced based on large remaining balances from prior years. Use project funds in this order “first year in, first year out” and so forth.
- **No Cost Extension (NCE).** For the initial extension of a grant, grantees must send a NCE Reporting form to their Project Officer. For any subsequent no-cost extensions, OSEP management must approve the extension.
- **Close-out.** You will receive a pre-expiration reminder letter 60-90 days prior to the performance end date along with guidance for preparing the Final Performance Report. A zero balance is expected by the end of the liquidation period.
  - **Final Performance Reports.** Final Performance Reports along with a signed cover sheet are due no more than 90 days after the end of the project and must be submitted via G5.
  - **Returning Federal Funds.** If any amount other than a zero balance remains in G5 when you are ready to submit your Final Performance Report, please contact your Project Officer for instructions on returning Federal funds to the U.S. Treasury.
- **Excessive Draw Downs.** Drawdowns are monitored, and excessive drawdowns will require explanations from grantees for excesses above 50% - 80% - 100% in each of the first three quarters. Please communicate with your Project Officer if you anticipate nearing any one of these thresholds.
- **Use of Grant Funds for Meetings/Conference Expenses.** Expenses must be consistent with your funded application and costs must be reasonable.
  - The primary purpose of the meeting must be to disseminate “technical information” (e.g., best practices; theoretical, methodological, or empirical advances in the field; training or professional development; or planning/coordinating work under the grant).
  - Consider whether there are more cost-effective or efficient alternatives.
  - Grant funds can be used to attend a meeting to achieve the purposes of the grant, but they cannot be used for alcoholic beverages, entertainment, or to conduct lobbying activities.



- Grant funds may not be used to pay for food for attendees at a conference or meeting you are hosting unless doing so is necessary to accomplish legitimate meeting or conference business (e.g., working lunch).
- All conference/meeting materials must include the following disclaimer found at EDGAR, 34 CFR 75.620:  
*The contents of this (insert type of publication; e.g., book, report, film) were developed under a grant from the Department of Education. However, those contents do not necessarily represent the policy of the Department of Education, and you should not assume endorsement by the Federal Government.*

- **Disclaimer Language on Project Work**

- Use the following disclaimer as required by EDGAR, 34 CFR 75.620:  
*The contents of this (insert type of publication; e.g., report, presentation, brief) were developed under a grant from the US Department of Education, #H325xxxxxx. However, those contents do not necessarily represent the policy of the US Department of Education, and you should not assume endorsement by the Federal Government. Project Officer, xxxxxx x. xxxxxxxx.*
- Use the OSEP logo, IDEAs that Work, on each document, publication, PowerPoint presentation, etc. to identify your funding source. Logo templates are located at the <https://www.osepideasthatwork.org> website under the “Resources for Grantees” heading.

## **PERSONNEL DEVELOPMENT PROGRAM TRAINING GRANTS ONLY**

On July 2, 2014, the Personnel Development Program (PDP) Data Collection System (DCS) was launched by OSEP’s contractor, Educational Policy Institute and its subcontractor, Westat. The purpose of DCS is to collect data from PDP grantees, scholars and their employers to assist in tracking and verifying the service obligation fulfillment for all scholars who received support from OSEP-funded Personnel Development Grants; to report on the program performance measures required under the Government Performance and Results Act (1993); and to support OSEP’s improved grant monitoring efforts.

- **Website.** Resources, required forms, regulations, and grantee and scholar training are archived at <https://www.pdp.ed.gov/osep>. Data collection forms approved by OMB #1820-0686 with an expiration date of May 31, 2017, are available on the website.



- **Help Desk.** The Personnel Development Program Data Collection Center (DCC) operates a Help Desk from 8 a.m. to 8 p.m. ET and is your primary contact for technical assistance on PDP data submission requirements. The DCC email address is [serviceobligation@ed.gov](mailto:serviceobligation@ed.gov), and its toll-free phone number is 1-800-285-6276. No question is too small or too challenging for the trained specialists who are available Monday through Friday to answer your questions. Please allow 24 hours for a response from the Help Desk during peak data collection periods. The web-based data collection system is available to grantees, 24 hours per day/seven days per week.
- **Service Obligation Pre-Scholarship Agreements and Exit Certifications.** According to Section E (a) and (c) of the 2005 Requirements and Section 304.23 of the 2006 Regulations, Institutions of Higher Education (IHEs) are required to enter into Pre-Scholarship Agreements with scholars and to provide Exit Certifications that scholars must verify and sign. All signed Pre-Scholarship Agreements (PSA) and Exit Certifications (EC) must be uploaded on the DCS website. IHEs may be responsible for repayment of grant funds in cases where they do not have a signed and completed PSA and EC for each scholar.
- **Timely Submission.** According to 34 CFR 75.217(d)(3)(ii), the Secretary can consider the failure to submit scholar data in a timely fashion in determining your project's ability to obtain future grants from the Office of Special Education Programs or under any other Department program.

**Feel free to call or email your Project Officer with any questions.**