

Grant Administrative Guidelines and Requirements

Please include your name, contact information, award number and award title in all communications relating to your grant.

Purpose. In order to monitor the projects it has funded and maintain records needed to support its tax-exempt status, the Foundation for Belmont Education (FBE) has developed guidelines for administering the grants it has awarded. These guidelines are intended to achieve these purposes while minimizing administrative burdens for both the grant recipients and FBE volunteers.

Basic Concepts. The grant proposal submitted to the FBE and the grant award letter from the FBE, including the attached *Project Summary* and *Grant Administrative Guidelines and Requirements* are key documents as they establish the basis on which FBE funds have been granted. They should be retained by the recipient for reference throughout the life of the grant. The Project Director listed on the grant award is responsible for managing the award and should provide this guideline to co-directors and PTO enrichment committee volunteers who are assisting with the grant.

Final Project Article. A Final Project Article is required by the date listed on the award documents. The article will serve as the basis for publicizing your project and should be carefully and thoughtfully prepared and submitted to Chris Kochem, FBE Administrator at info@fbe-belmont.org or via inter-school mail to Chris Kochem, Foundation for Belmont Education, c/o Belmont High School.

Project Expiration. Unless otherwise extended **upon request of the Project Director** and with the approval of the FBE's VP of Programs and Treasurer, FBE funds must be expended prior to the project expiration date. After the project expiration date, any remaining grant funds for this project will be reverted to the FBE's general funds to be allocated for other educational efforts to support the Belmont Public Schools.

Payment of the Award. **Your award letter and your Project Summary page indicate whether your award is to be paid by the Belmont Schools or by the FBE.** Only expenses consistent with the amounts listed in the "Summary of Funding" (on the Project Summary page) will be approved for payment. It is the Foundation's policy that the PTO/PTA ***must not*** make any grant payments to independent contractors or businesses on the FBE's behalf.

Policy Regarding Grant Payments. Please read the FBE "Policy Regarding Payments" (attached) for the **rules of payment that the FBE uses for payment of grants.**

Questions: Contact Angela Chan, VP, Programs, programs@fbe-belmont.org, 617-484-7807 or Chris Kochem, FBE Administrator, info@fbe-belmont.org, 617-489-4661.

Foundation for Belmont Education

Policy Regarding Payments for Innovative Teaching Initiative Awards

Rules of payment that the FBE uses for payment of grants:

1) If the award letter states that payment will be made by the Belmont Schools:

Example: For staff time or for purchases of technology and other equipment, books or study guides, for events by large organizations that will accept a Purchase Order from the Belmont Public Schools, and for Amazon.com purchases.

Payment **must** be made through the Town of Belmont's Account Payable System. **You, as the Project Director (or your PTO enrichment committee volunteer), should arrange with the secretary for your school or department to issue a Belmont Public Schools' purchase order for this award.** So that the grant can be properly processed by the Belmont Schools and reimbursed by the FBE, the purchase order must include the FBE award number, which is noted in your award letter. If you have any questions about purchase orders or payments for businesses/corporations, please contact Gioia Rizzo, grizzo@belmont.k12.ma.us or 617-993-5430.

2) If the award letter states that payment will be made by the FBE:

If the Project Director's application indicated that the award has unusual payment circumstances which would make it difficult to process said award through the Town's Account Payable System, the FBE will work with the Project Director to pay that award directly.

- A. *Example: A grant for \$750 for an independent vendor/contractor who is an actor and will present a program about life in colonial times. The vendor's contract requires a deposit and/ or payment on the day of the event.*

Payments to independent vendor/contractors.¹

While the Town of Belmont **will not pay** a deposit or make payment on the day that a service is provided, many independent vendors require these types of payments as part of their contracts. In these cases, with advance notice, the FBE will make payment directly to the vendor. As Project Director, you (or the PTO enrichment committee volunteer) must notify Chris Kochem, FBE Administrator (617-489-4661, info@fbe-belmont.org) a minimum of 21 days in advance of your scheduled event. (PTO/PTA's **must not** make these payments for the FBE.)

- B. *Example: a purchase from a retailer or business that does not have a relationship with the Belmont Schools or to purchase supplies for a project in a case where it is more cost effective to make this purchase directly.*

Prior to the Project Director using cash or a personal credit card to make any purchases for an award, the Project Director must contact Chris Kochem, FBE Administrator (617-489-4661, info@fbe-belmont.org) to discuss the circumstances for such a purchase, to obtain a copy of the FBE's tax exempt certificate, and to coordinate reimbursement.

¹So that the FBE is able to meet its IRS reporting obligations, **the vendor will be required to supply a Form W-9* and a copy of its contract/invoice to the FBE a minimum of 21 days prior to your event.** You may ask Chris Kochem to contact the vendor directly or you may obtain the signed W-9 from the vendor and submit the W-9 and the contract/invoice via email to Chris at info@fbe-belmont.org via interschool mail to Chris Kochem, FBE Administrator, c/o Belmont High School. If the vendor prefers, he/she may send both directly to Chris Kochem, Foundation for Belmont Education, P.O. Box 518, Belmont, MA 02478. Once the Form W-9 and the contract/invoice have been received by the FBE, Chris will notify the FBE treasurer that a check should be issued in the name of the vendor. If requested by the vendor, the FBE treasurer will deliver the check to you as Project Director to be presented to the vendor on the day of the event.

If you have any questions about payments for independent contractors, please contact Chris Kochem at 617-489-4661, info@fbe-belmont.org.

*W-9 - IRS/Request for Taxpayer Identification Number and Certification, available at www.irs.gov