



Department
of Health



New York State Public Health Corps (NYSPHC) Fellowship Program

Educational Series

Budgeting and Financial Management
12.14.2022

Welcome!

Agenda

- Welcome and Agenda
- Learning Objectives
- Program Overview
- Federal Grant Management
- Questions
- Closing Evaluation/Program Updates

Learning Objectives

- Review the life cycle of Federal grants
- Discuss requirements for Federal grant oversight
- Review required deadlines and components of how to monitor/track your budget
- Recognize budget categories and their associated definitions

NYSPHC Program Overview



January 2021 Establishment of NYSPHC

New York State will launch the New York State Public Health Corps (NYSPHC) that will:

- Enhance public health capacity to support COVID-19 vaccination operations
- Increase preparedness to respond to future public health emergencies

Working with LHDs and NYS Department of Health (NYSDOH), NYSPHC will work to recruit and deploy Public Health Fellows to be assigned in communities across New York State

NYSPHC Educational Series



The New York State Public Health Corps (NYSPHC) Educational Series is excited to offer live monthly educational sessions addressing the Core Competencies of Public Health!

Educational sessions will take place on the second Wednesday of every month from 12-1 PM

Learning Objectives:

To provide Fellows with opportunities to expand their skill sets and knowledge on emerging public health activities, programming, and state priorities. The [PH Wins](#) evidence-based core competencies provide the foundation for the NYSPHC education and training sessions for Fellows to ensure an effective and knowledgeable public health workforce.

Topics to be covered:

Budget and Financial Management

Policy Engagement

Data-Based Decision Making

Justice, Equity, Diversity, Inclusion (JEDI)

Change Management

Tentative Dates (12-1PM):

December 14th, 2022
January 11th, 2023
February 8th, 2023
April 12th, 2023
May 10th, 2023

Each meeting will be 60 minutes long with about 40 minutes of content and 20 minutes of Q&A or discussion. Registrants will be provided with an agenda and learning objectives prior to the learning session. Recordings of the meetings will be posted to the [Training Resource Center website](#).

Registration details coming soon!

Questions? Please contact your Regional Fellowship Placement Coordinator for more details

Educational Series

- Sessions on core competencies and public health topics
- Guest speakers from NYSDOH, statewide IHEs and more

Federal Grant Management



The Grants Lifecycle



The Grants Life Cycle

The Grants Life Cycle has three major stages: pre-award, award, and post-award. The applicant / recipient and awarding agency have unique roles in each stage. The duration of an award may vary depending on the nature of the project. General descriptions of each stage are provided...however, actual assistance awards may differ due to unique circumstances or legislation requirements.

<https://www.cdc.gov/grants/lifecycle-overview/index.html>

Pre-Award

■ Pre-Award (4-12 Months)

The pre-award phase begins when the agency solicits applications through Funding Opportunity Announcements (FOAs) and end after the applications have been reviewed and scored.

Award

■ ■ Award (1-5 Months)

After the objective review of all applications, the awarding agency will determine whether an award will be made.

Post-Award

■ ■ ■ Post-Award (1-5 Years)

The post-award phase begins when a successful applicant, known as a grantee or awardee, draws on awarded funds and starts work on achieving the outcome(s) of the grant.

Grant Requirements and Policies

All Operations Conducted Must Follow Grant Requirements and Policy

- ✓ OMB* (Office of Management and Budget) Requirements
 - Federal Uniform Guidance
 - HHS Grants Policy
 - Federal Cost Principles

- ✓ HRI (Health Research Inc) Policies

- ✓ DOH (Department of Health) Policies

*Office of Management and Budget
(Federal entity that oversees the performance of federal agencies, and administers the federal budget)

Administrative and Budget Tracking



Deadline Tracking

- ✓ Grant Continuation Applications
- ✓ Progress Reports
- ✓ Fiscal Reporting
- ✓ Sponsor Prior Approvals
- ✓ Grant Close Out

Budget Tracking

- ✓ Funds Awarded
 - Base vs. Supplemental
- ✓ Review/Approve Expenses
 - OMB Requirements / Cost Principles
 - Allowable
 - Allocable
 - Appropriate
 - Reasonable
- ✓ Monitor Budget Category Deviations
 - 25% or \$250,000
- ✓ Status Reports (Real Time/Weekly/Monthly)
- ✓ Account Liquidation (Grant Close Out)

Budget Categories

All items must include a narrative justification related to program objectives

Personal Services (Salaries and Wages)

- For each requested position, provide the following information: name of staff member occupying the position, if available; annual salary; percentage of time budgeted for this program; total months of salary budgeted; and total salary requested.

Fringe Benefits

- Any nonwage payment or benefit (e.g., pension plans, profit-sharing programs, vacation pay, and company-paid life, health, and unemployment insurance programs) granted to employees by employers

Budget Categories Continued

Supplies

- Items such as general office supplies, software, computers, and laboratory supplies

Travel

- List cost, destination, and duration of the trip. Include traveler names and the purpose of travel

Equipment

- List all non-expendable items with a useful life of more than one year (Federal threshold \$5,000 or more)

Budget Categories Continued

Miscellaneous

- Items not included in the previous budget categories.

Subcontracts/Consultants

- Hiring an individual/organization to give professional advice or services (e.g., training, expert consultant, etc.) for a fee but not as an employee of the grantee organization.

Administrative Costs

- Frequently referred to as overhead expenses (for example, rent and utilities) and general and administrative expenses (for example, officers' salaries, accounting department costs and personnel department costs)

Personnel Management

- ✓ Recruitment Requests
 - Title / Grade
 - Job Description

- ✓ Personnel Changes
 - Resignations
 - Backfills
 - Requests for New Positions

- ✓ Students / Temporary Personnel

Contract Management

- ✓ Requests for Proposals
- ✓ Scope of Work / Deliverables
- ✓ Budget / Cost Substantiations
- ✓ Contract Execution
- ✓ Voucher Processing
- ✓ Status Reports
- ✓ Close Out

Performance Monitoring

- ✓ Progress Reports
- ✓ Deliverable Completion Tracking
- ✓ Voucher / Expense Tracking
- ✓ Follow-up / Technical Assistance / Site Visits
- ✓ Equipment Inventory
- ✓ Desk/On-site Audits

Grant Close Out

✓ Final Progress Report

✓ Final Financial Report

GOAL = All Funds 100% Spent

✓ Equipment Inventory

✓ Inventions

Questions?



Contact Information

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**Closing, Announcements,
Updates, Save the Date**



Announcements & Updates

- Please complete the Educational Series Evaluation Survey which will be sent via email following this meeting
- If you want to continue the conversation, join the NYSPHC Fellowship Program LinkedIn Group to continue networking and professional development:
<https://www.linkedin.com/groups/14059709>



NYSPHC Training and Resources Website

<https://nysphcresources.health.ny.gov/training-resource-center>

New York State Public Health Corps
Fellowship Program



Training Resource Center Home



About the
NYSPHC



Fellow Training
Resources



Mentor Training
Resources



Resources by
Region



Workgroup
Resources



NYSPHC Events
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