



# **STEPS TO SUCCESS**

## **Getting Your Award Letters Signed**

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Second Edition





## **STEPS TO SUCCESS**

**Or**

### **How to get your letters through Finance & Operations**

We want **all** Division/Bureau letters to move through the review process in Finance & Operations/Administrative Services Division (F&O/ASD) at lightning speed. If preparers and managers follow the steps below this really can happen.

- I.**  **Prepare an allocation spreadsheet** based on how your grant is to be awarded (i.e. enrollment/grade data, RFA application, Federal/State grant award, etc.) To this spreadsheet add **Institution** information using the up-to-date List of Superintendents (for Districts) and/or the List of Charter School Representatives (for Charter Schools) found in the [R: drive/PED Shared/PED Temp/List of Superintendents....](#) (See sample spreadsheet attached.) **The list from the R: drive** is the list F&O/ASD will use to check the addressee information on your letters (superintendent's prefix, first name, last name, title; district/charter school name, street address; business manager's prefix, first name, last name, title). **We will run [this](#) list from the R: drive on the day the letter template is received at F&O/ASD, and will use [this](#) list throughout the circuit of your letters.** Please note: if information changes in the meantime, we will ask you to update your letter.
- II.** **Prepare a letter template** (using the appropriate template attached). **Double check** the budgeted amount for your award and make sure the fund and revenue codes in the template are correct.
- III.** **Refer to the House Style Manual** if you edit your template. 
- IV.** **Email the [allocation spreadsheet](#) and the letter [template](#)** to FGM Lucero at [susan.lucero@state.nm.us](mailto:susan.lucero@state.nm.us) and to Valerie Padilla at [valerie.padilla@state.nm.us](mailto:valerie.padilla@state.nm.us)
- V.** **Place the letter [template](#) and the [allocation spreadsheet](#) in a "Return To" folder** with the Program contact's name on it. **(Please do not bring anything to F&O/ASD for signature without placing it in a folder. Thank you.)**




**VI. Fill out and attach the routing sheet to the “Return To” folder.**

**PLEASE NOTE:** We will return your folder if the Division Director and the Bureau Chief have not indicated approval on this routing sheet. Also, **the routing sheet has been changed** to add the name of the document (i.e. K3+ award letters, Carl Perkins JAG letters, etc.) and to accommodate multiple trips back and forth from Program to ASD and back again.

FINANCE AND OPERATIONS ROUTING PROCESS				
Your Name:				
Your Bureau:				
Your Division:				
Date of Award Letter:		Contact Phone #:		
Document Name:				
ROUND ONE				
Date Rec'd	Title	Approval Initials	Date Approved	Comments
	Bureau Chief			

**VII. Take the “Return To” folder to F&O/ASD. We will do our best to review your template and spreadsheet within 6 working days. The letter template and spreadsheet will be returned to program for correction, or approved. If your letter and/or spreadsheet are returned for corrections, please return the edited (by F&O/ASD) letter template and/or spreadsheet with the corrected ones, so that we can verify that you caught all the requested changes.**

**VIII.**  Once the spreadsheet and the template have been approved, use them to prepare a mail merge to create the award letters. If you don't know how to do a mail merge, call ASD at 827-6519 and we will find someone who can help you. Letters should be single-sided; font size can range from 10-12; font should be Times New Roman; letter should NOT be stapled.

**IX. All award letters are signed by the F&O Deputy Secretary, Paul Aguilar. Deputy Aguilar's closing is “Best regards”. Please put the “Sign Here” tabs on the right side of the letter pointing towards where he will sign. Please use the following format:**

Best regards,



Hipolito “Paul” Aguilar  
Deputy Secretary, Finance and Operations



The process for award letters:

### PROGRAM

- **Prepare an allocation spreadsheet and letter template** for your award. (See sample attached). **Letter template** should be SINGLE SIDED. Please don't staple the letter.
- **Email the allocation spreadsheet and letter template** to [FGM.lucero@state.nm.us](mailto:FGM.lucero@state.nm.us) and to [valerie.padilla@state.nm.us](mailto:valerie.padilla@state.nm.us)
- **Bring the letter template and spreadsheet in a "Return To" folder with the F&O routing sheet attached** to F&O/ASD.

### F&O/ASD

- The folder is **logged in**.
- **Contact list(s) from the R: drive printed** and placed in the folder.
- **Bureau approval, grammar, spelling, addressee information, dates, salutation and closing are checked.**
- The folder is **logged out to FGM**.
- **FGM ensures financial information is correct** and that it matches the budget
- **FGM** returns the folder to F&O/ASD for logging.
- At this point, if there are **corrections**, the folder is returned to program to make the corrections.
- Program returns the corrected template and the edited template to ASD for recheck.
- The folder is returned to program for **corrections**, or **approved**. **Please see flowchart following.**
- **Whenever** the template and spreadsheet are moved they will always be logged in and out. It **will** expedite the process if the documents are logged.

### PROGRAM

- **Once the letter template and spreadsheet are approved, program prepares the mail merge. Please date letters 6 days out to allow for final review and F&O "fires"/absences/illness.**
- You may use **paperclips** on multi-page letters. Please DO NOT staple them. Thank you.
- Program brings the **corrected** template, the merged letters and the spreadsheet in the "Return To" folder to F&O/ASD for logging.

### F&O/ASD

- **ASD** ensures all corrections were made and the folder is logged out to CFO.
- **CFO double checks the letters** and the spreadsheet. If there are no errors, the letters will be logged to the **DS** for signing.
- If there are errors, the letters will be returned to Program to make corrections. CFO will recheck upon their return and if there are no errors, the letters will be logged to the DS for signing.
- **Signed letters are returned to program** for mailing and scanning.

### PROGRAM

- **Scan your letters to the R: drive.**
- **Email the in-house people the location on the R: drive** they will find a copy of the letters.
- **Plan ahead.** Allow **6 working days** for your award letters to pass through the F&O/ASD review. Date your letter accordingly.

## WHAT DOES CFO LOOK FOR?

- Correct PED letterhead
- Correct addressee information
- Correct Salutation—Dear Superintendent Parks:
- Headers on second page match the information on first page
- Correct grammar and spelling
- Calculations are correct; and dollar amounts in letter tie to spreadsheet
- Proper alignment of numbers (right justified)
- Closing is in proper format

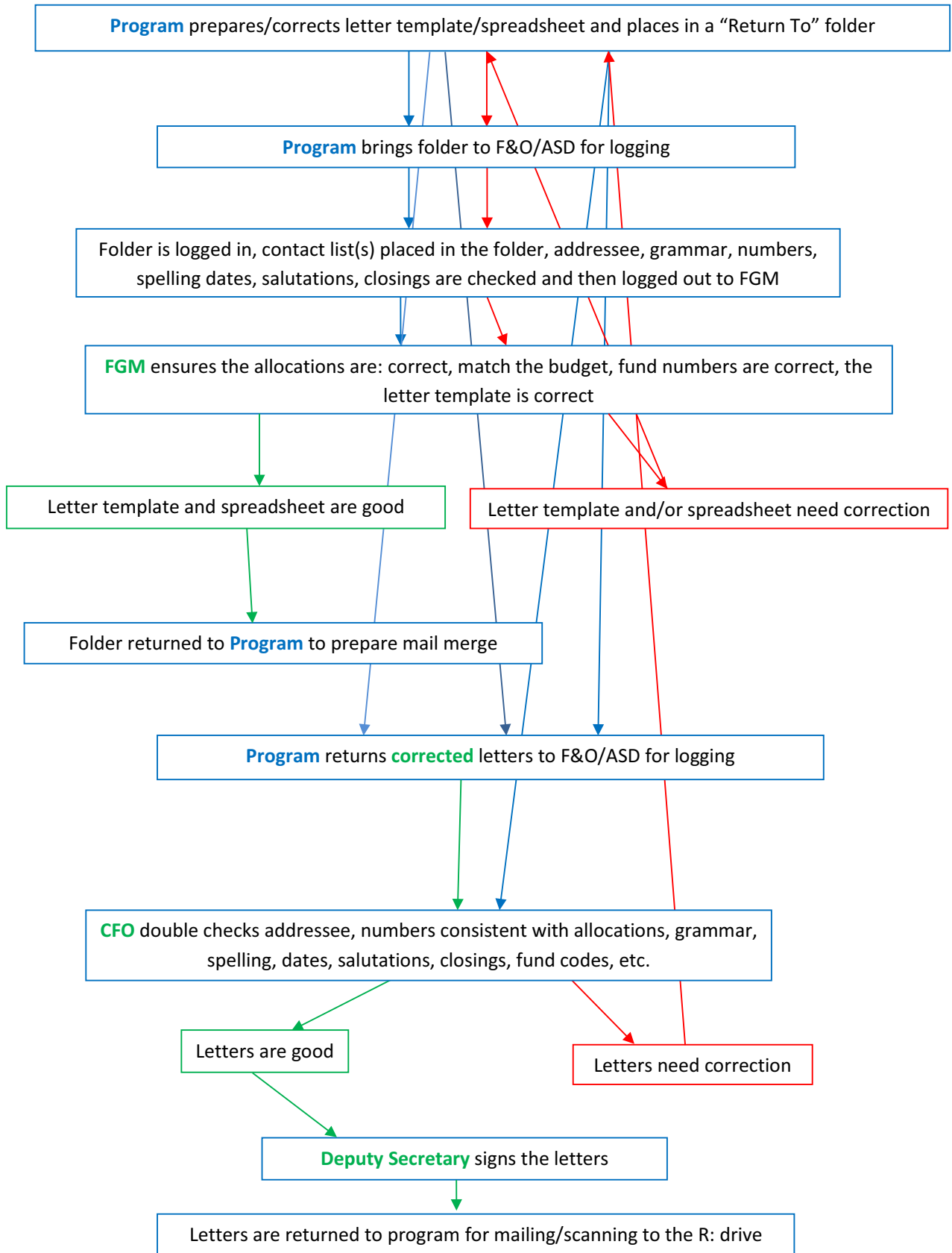
## WHAT DOES FGM LOOK FOR?

- Use of correct template
- Compliance Information – federal or state
- Deadlines – BAR/Expenditures/Final RfR

IF the templates provided do not fit your award...

- Opening statement describes purpose and nature of award
- Intended Use of Funds (Optional) – Concise Paragraph

## FINANCE AND OPERATIONS AWARD LETTER PROCESS FLOWCHART





STATE OF NEW MEXICO  
PUBLIC EDUCATION DEPARTMENT  
300 DON GASPAR  
SANTA FE, NEW MEXICO 87501-2786  
Telephone (505) 827-5800  
[www.ped.state.nm.us](http://www.ped.state.nm.us)

HANNA SKANDERA  
SECRETARY OF EDUCATION

SUSANA MARTINEZ  
GOVERNOR

«Date»

«Prefix» «First» «Last», «Title»

«Institution»

«Address»

«City», «ST» «ZIP\_code»

Dear «Title» «Last»:

Below is the final FY14-15 award amount for «INSTITUTION»'s grant funded through the «Grant Name». Please take note of the following federal grant information specific to that award:

CFDA: 84.048 Career and Technical Education – Basic Grants to States

Award Name: Carl D. Perkins Career and Technical Education Act of 2006

Grant Award No.: V048A140031

Award Amount: « \$ »

Federal Funding Agency: «eg. USDE Office of Vocational and Adult Education»

Compliance Requirements: EDGAR 34 CFR Parts (74 - 99)

OMB A-133 and OMB A-87 or OMB A-21 (Cost Principles for Educational Institutions)

**(For awards before December 26, 2014)**

[http://www.whitehouse.gov/omb/circulars\\_default](http://www.whitehouse.gov/omb/circulars_default)

2 C.F.R. 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements  
for Federal Awards

**(For awards after December 26, 2014)**

[http://www.ecfr.gov/cgi-bin/text-idx?tpl=/ecfrbrowse/Title02/2cfr200\\_main\\_02.tpl](http://www.ecfr.gov/cgi-bin/text-idx?tpl=/ecfrbrowse/Title02/2cfr200_main_02.tpl)

**NOTE:** The allocations for post-secondary institutions are based on the proportion of students at «Institution» who received Pell Grants and BIA assistance compared to the total number of these students in the state. The amount allocated to public school districts or consortia is based on the federal formula provided in the Perkins Act.

Each application was reviewed against the Basic Grant Evaluation Rubric and <<Institution>> substantially met the revision requirements. Thank you for working with the staff of the College and Career Readiness Bureau (CCR) to achieve a funded application.

Subject  
Date  
Page #

Please submit a BAR through OBMS for this amount using **fund code <<24xxx>>** and **revenue object code 44500**. Please adhere to the following timelines required for obligation, liquidation and RfR submission:

- **June 30, 2015 – Funds must be fully encumbered/obligated**
- **July 07, 2015 – Last date to submit RfR for FY 2013-2014 expenditures**
- **July 17, 2015 – Last date to submit BAR for unliquidated obligations as of June 30, 2015**
- **July 31, 2015 – Unliquidated obligations must be fully expended/liquidated**
- **August 14, 2015 – Final date to submit RFR for 2014-2015 unliquidated obligations expended as of July 31, 2015**
- **August 15, 2015 – Award CLOSED**

Should you have any questions, please feel free to contact the CCR at (505) 827-1800, and any of the staff can assist you.

Best regards,

Hipolito “Paul” Aguilar  
Deputy Secretary, Finance and Operations

HA/ES/gf

cc: Local Perkins Project Director, «Institution»  
«Bus. Mngr First Name» «Bus. Mngr Last Name»,«Bus.Mngr Title», «Institution»





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HANNA SKANDERA  
SECRETARY OF EDUCATION

SUSANA MARTINEZ  
GOVERNOR

«Date»

«Prefix» «First» «Last», «Title»  
«Institution»  
«Address»  
«City», «ST» «ZIP\_code»

Dear «Title» «Last»:

«Institution» has been awarded its final FY14-15 award amount and any carryover and/or other additional funding for the grant funded through «eg. Title (24101)». Please note the following federal grant information specific to the award «Institution» is receiving through the New Mexico Public Education Department (PED):

CFDA: «eg. 84.010A Title I»

Award Name: «eg. Title I»

Grant Award No.: «S012A10031»

Grant Award No.: «eg. S013A10031»

Grant Award No.: «eg. S014A10031»

Federal Funding Agency: USDE

Compliance Requirements: EDGAR 34 CFR Parts (74 - 99)

OMB A-133 and OMB A-87 or OMB A-21 (Cost Principles for Educational Institutions)

**(For awards before December 26, 2014)**

[http://www.whitehouse.gov/omb/circulars\\_default](http://www.whitehouse.gov/omb/circulars_default)

2 C.F.R. 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements  
for Federal Awards

**(For awards after December 26, 2014)**

[http://www.ecfr.gov/cgi-bin/text-idx?tpl=/ecfrbrowse/Title02/2cfr200\\_main\\_02.tpl](http://www.ecfr.gov/cgi-bin/text-idx?tpl=/ecfrbrowse/Title02/2cfr200_main_02.tpl)

**NOTE:** Based on the available USDE funding, final FY14-15 awards are listed below. Please review «Institution's» current budget in the Operating Budget Management System (OBMS) and submit an electronic Budget Adjustment Request (BAR), using the PED OBMS website. Please consider «Institution's» currently pending budget adjustments to ensure the necessary adjustments to reflect 100 percent of the awards as listed below:

Subject  
Date  
Page #

<b>FY13-14 Carryover</b>	
<b>FY13-14 Redistribution</b>	
<b>FY14-15 Final Allocation</b>	
<b>Total District Budget</b>	
<b>FY14-15 Approved Budget</b>	
<b>Total Amount of BAR</b>	

Please submit a BAR through OBMS for this amount using **fund code <<24xxx>>** and **revenue object code 44500**. Please adhere to the following timelines required for obligation, liquidation and RfR submission:

- Submit your BAR and a copy of this letter through OBMS by **April 20, 2015**.
- The FY 13-14 redistribution and carryover amounts indicated above must be obligated by June 30, 2015 and expended by September 30, 2015.
- The last day to submit request for reimbursements for FY 14-15 is **July 7, 2015**.

Best regards,

Hipolito "Paul" Aguilar  
Deputy Secretary, Finance and Operations

HA/SL/gf

cc: Local Program Project Director, «Institution»  
«Bus. Mngr First Name» «Bus. Mngr Last Name», «Bus. Mngr Title», «Institution»



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HANNA SKANDERA  
 SECRETARY OF EDUCATION

SUSANA MARTINEZ  
 GOVERNOR

«Date»

«Prefix» «First» «Last», «Title»  
 «Institution»  
 «Address»  
 «City», «ST» «ZIP\_code»

Dear «Title» «Last»:

Under the U.S. Department of Education Appropriation Act for federal grant year 2014 (GY 14) affecting the state fiscal year 2014-2015 (FY14-15), the Public Education Department (PED), Special Education Bureau (SEB) has received its final allocation and is required to make adjustments to all sub-grant awards. Below is the federal grant award information specific to the award your entity is receiving:

<b>Individuals with Disabilities Education Act, Part B (IDEA B)</b>		
<b>Program Title</b>	<b>Special Education Grants to States</b>	<b>Special Education Preschool Grants</b>
<b>CFDA #</b>	84.027A	84.173A
<b>Award #</b>	H027A120078 H027A130078 H027A140078	H173A120078 H173A130078 H173A140078
Federal Funding Agency: United States Department of Education Compliance Requirements: EDGAR 34 CFR Parts (74 - 99)		
OMB A-133 and OMB A-87 or OMB A-21 (Cost Principles for Educational Institutions) <b>(For awards before December 26, 2014)</b> <a href="http://www.whitehouse.gov/omb/circulars_default">http://www.whitehouse.gov/omb/circulars_default</a> 2 C.F.R. 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards <b>(For awards after December 26, 2014)</b> <a href="http://www.ecfr.gov/cgi-bin/text-idx?tpl=/ecfrbrowse/Title02/2cfr200_main_02.tpl">http://www.ecfr.gov/cgi-bin/text-idx?tpl=/ecfrbrowse/Title02/2cfr200_main_02.tpl</a>		

Based on the available funding and the application submitted by «Institution», GY14 final and GY13 carryover awards are listed below. Please review the current budget for «Institution» in the Operating

Budget Management System (OBMS) and submit an electronic Budget Adjustment Request (BAR), including a copy of this letter, utilizing OBMS to make the necessary adjustments to reflect the total FY14-15 Approved Budget amount as listed below:

GRANT NAME	UCOA FUND CODE	FY14 FINAL Allocation (FY14-15)	FY 13-14 Carryover (FY13-14)	FY14-15 Approved Budget	Current Approved Budget in OBMS	Total Amount to BAR
IDEA B Entitlement	24106					
IDEA B Preschool	24109					
Coordinated Early Intervening Services (CEIS)	24112					
Private School Proportionate Share	24115					
Risk Pool	24120					

When submitting a BAR, please keep in mind that the amount budgeted for CEIS (Fund 24112) and Private School Proportionate Share (Fund 24115) are **not** in addition to the Final Allocation amount for IDEA B Funds 24106 and 24109. The cumulative budget for Funds 24106, 24109, 24112 and 24115 shall not exceed the *GY14 FINAL Allocation* amount identified for Funds 24106 and 24109. For reference, the BAR process is located on the PED website and can be accessed at: <http://ped.state.nm.us/div/fin/school.budget/OBMS.html>.

Funding under this award must be used in compliance with the applicable provisions of IDEA B, as follows:

- only to pay the excess costs of providing special education and related services to children with disabilities;
- to supplement state, local and other federal funds and not to supplant such funds; and
- not to reduce a Local Educational Agency’s (LEA) Maintenance of Effort (MOE) for the education of children with disabilities below the preceding year’s level except as allowed by 34 CFR §§ 300.204 and 205 [20 U.S.C. 1413(a)(2)(A), 34 CFR § 300.202].

If you have questions regarding allowable costs, please see the Office of Management and Budget (OMB) Circular at: [http://www.whitehouse.gov/omb/circulars\\_default](http://www.whitehouse.gov/omb/circulars_default).

Once the sub-grant for «Institution» is considered substantially approvable, funds cannot be transferred from one fund code to another or between function codes without submitting an amended IDEA B Application and a BAR, to include the required signatures and this award letter.

The IDEA B Application for «Institution» must be amended to reflect the *GY14 Final Allocation* amount. A template titled *Attachment A* has been created specifically for amending the IDEA B Application's Objectives 1 through 4. *Attachment A* can be accessed from the SEB website at: <http://ped.state.nm.us/SEB/fiscal/index.html>.

Funds can never be transferred out of the Private School's Proportionate Share (Fund 24115) or Mandatory CEIS (Fund 24112). Fund 24115 will carry over to the next year under the same fund code. Funds set aside for Mandatory CEIS (Fund 24112) must remain within this fund until all requirements are met in regards to significant disproportionality.

When submitting an electronic BAR to bring the budget authority for «Institution» in alignment with the *FY14-15 Approved Budget* amount identified in this award letter, please use the applicable fund codes identified above and **revenue code 44500**. **Please adhere to the following timelines required for obligation, liquidation and Requests for Reimbursement (RfR):**

- Submit your BAR, a copy of this letter, and Attachment A through OBMS by **March 6, 2015**.
- The FY 2013-2014 carryover amounts indicated above must be obligated by June 30, 2015 and expended by September 30, 2015.
- The last day to submit RfRs for FY 2014-15 is **July 7, 2015**.

For questions, please contact:

Ms. Patricia Hawkins, Fiscal Manager  
Special Education Bureau  
120 South Federal Place, Room 206  
Santa Fe, NM 87501  
(505) 827-3599  
[patricia.hawkins@state.nm.us](mailto:patricia.hawkins@state.nm.us)

Thank you for your continued cooperation in this process.

Best regards,

Hipolito "Paul" Aguilar  
Deputy Secretary, Finance and Operations

HA/ph

cc: «Bus. Mngr First Name» «Bus. Mngr Last Name», «Bus. Mngr Title», «Institution»  
Special Education Director, «Institution»



STATE OF NEW MEXICO  
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HANNA SKANDERA  
SECRETARY OF EDUCATION

SUSANA MARTINEZ  
Governor

October 10, 2014

«Prefix» «Super First Name» «Super Last Name», «Title»  
«District Name»  
«Address»  
«City», «State» «Zip»

RE: After School and Summer Enrichment Programs

Dear «Title» «Last Name»:

State appropriated funding is awarded to «District Name» for Chama Middle School and Escalante Middle/High School by the NM Public Education Department (PED). This funding is to be used to implement «District Name»'s After School and Summer Enrichment Programs. (See attached Scope of Work.) This award is based upon reimbursable expenditures. Completion of the scope of work requirements and documentation supporting expenditures is required.

Please note the following NM State Legislation appropriation information specific to this award:

Request for Application (RFA): 14-92400-00006

Award Name: After School and Summer Enrichment Programs

Funding Agency: NM Public Education Department, Special Appropriation Fund

Compliance Requirements: NM Procurement Code (NMSA Chapter 13)

2.42.2 NMAC, Travel & Per Diem;

NM Department of Finance Administration Rules and Regulations

<http://nmdfa.state.nm.us/Forums.aspx>

The table below indicates «District Name»'s FY15 state appropriation for After School and Summer Enrichment Programs. Please submit a Budget Adjustment Request (BAR) for this amount using **fund code 27168** and **revenue object code 43202** within the Operating Budget Management System (OBMS) located on the PED OBMS website.

FY15 Budget	\$75,000.00
Total Amount of BAR	\$75,000.00

In OBMS, attach a copy of this award letter and the program-approved Budget Justification Form, which describes how «District Name» will use the funds. The supporting documentation must be sufficient to ensure allowable uses for the funds under the funded program; failure to submit sufficient descriptions will delay approval of BAR.

This award is effective from October 10, 2014 – June 30, 2015. The FY15 award amount must be fully expended by June 30, 2015. The last day to submit requests for reimbursement for FY15 will be July 7, 2015.

If you have fiscal questions, please contact your designated fiscal analyst within the Fiscal Grants Management Bureau, who will refer your question to the appropriate level. If you have programmatic questions, please contact Dean Hopper, M.A.Ed., Coordinated School Health & Wellness Bureau Director, at 505-827-1806.

Best regards,

Hipolito “Paul” Aguilar  
Deputy Secretary, Finance and Operations

Encl: Scope of Work and Financial Worksheet

HA/ck

cc: Mr. Eric Martinez, Afterschool Program Coordinator, Chama Valley ISD  
Ms. Danette Garcia, Business Manager, Chama Valley ISD

**FINANCE AND OPERATIONS ROUTING PROCESS**

**Your Name:**

**Your Bureau:**

**Your Division:**

**Date of Award Letter:**

**Contact Phone #:**

**Document Name:**

**ROUND ONE**

<b>Date Rec'd</b>	<b>Title</b>	<b>Approval Initials</b>	<b>Date Approved</b>	<b>Comments</b>
	Bureau Chief			
	Bureau Editor/Division Director			
	F&O Executive Administrative Assistant			
	Fiscal Grants Management			
	Director of Administrative Services			
	Deputy Secretary F&O			

**ROUND TWO**

<b>Date Rec'd</b>	<b>Title</b>	<b>Approval Initials</b>	<b>Date Approved</b>	<b>Comments</b>
	Bureau Chief			
	Bureau Editor/Division Director			
	F&O Executive Administrative Assistant			
	Fiscal Grants Management			
	Director of Administrative Services			
	Deputy Secretary F&O			

**ROUND THREE**

<b>Date Rec'd</b>	<b>Title</b>	<b>Approval Initials</b>	<b>Date Approved</b>	<b>Comments</b>
	Bureau Chief			
	Bureau Editor/Division Director			
	F&O Executive Administrative Assistant			
	Fiscal Grants Management			
	Director of Administrative Services			
	Deputy Secretary F&O			





**Public Education Department, Finance and Operations  
Administrative Services Division  
Finance and Operations (F&O) Document Resubmittal**

The letters/document attached were not processed for the reason(s) checked below. Please correct the errors and resubmit them to the ASD Division.  
**Please resubmit this form with the corrected documents.**

Date: \_\_\_\_\_

Program: \_\_\_\_\_

Document: \_\_\_\_\_

Spreadsheet was not a merged document			Deputy Secretary's name/title incorrect
Letter template was not submitted for review prior to creation of the merged letter			Deputy Secretary's closing incorrect
Spreadsheet and letter template were not emailed to Susan Lucero and Valerie Padilla			Fund Number/Revenue Object Code Incorrect
Document(s) were not in a "Return To" folder			Grant award number(s) incorrect
F&O routing sheet was not filled out and signed by <b>bureau personnel</b>			Document missing
Amounts in letter do not correspond to amounts on spreadsheet			Letterhead template incorrect
<b>Final</b> letter not dated 6 working days out from the date letters were delivered to ASD			No/misplaced "sign here" tabs
Superintendent(s)' name/title incorrect			Corrected letter template/letter not included with the "final" mail merge
District Name/address incorrect			
Incorrect Salutation			
Improper use of grammar			
Misspelling in body of letter			

Remarks: \_\_\_\_\_

**Bureau Chief Acknowledgement** \_\_\_\_\_ **Required** \_\_\_\_\_

**Corrected by:** \_\_\_\_\_ **Phone** \_\_\_\_\_ **Date** \_\_\_\_\_



# STEPS TO SUCCESS

**Getting Your Award Letters Signed**



# I. Prepare An Allocation Spreadsheet

- Start with the spreadsheets at:

<R: drive/PED Shared/PED Temp/List of Superintendents...>

District	MAILING ADDRESS	CITY	ST	ZIP	SUP T. PRE FIX	SUPT. LAST NAME	SUPT. TITLE	Bus. Mngr. Prefix	Bus Mngr First	Bus Mngr Last	Bus Mngr Title
Academy of Trades and Technology	2551 Karsten Ct., SE	Albuquerque	M	87102	Mr.	Christopher Hotchkiss	Principal	Mr.	Alfred	Martin	Business Manager
ACE Leadership High School	800-B 20th St., NW	Albuquerque	M	87104	Ms.	Tori Stephens-Shauger	Principal	Mr.	David	Vigil	Finance Director
Alamogordo Public Schools	P.O. Box 650	Alamogordo	N	88310	Ms.	Adrienne Salas	Superintendent	Ms.	Carol	Genest	Finance Director
Albuquerque Public Schools	P.O. Box 25704	Albuquerque	M	87125	Mr.	Ruben Hendrickson	Interim Superintendent	Mr.	Don	Moya	Chief Financial Officer

- Add the award information

Title I Part A	Title I Part D	Title I 24101 Planning Award
\$29,344.65	\$0.00	\$29,344.65
\$71,342.03	\$0.00	\$71,342.03
\$1,291,925.83	\$0.00	\$1,291,925.83
\$28,184,394.23	\$160,644.24	\$28,345,038.47

# Here is what your spreadsheet should look like

District	MAILING ADDRESS	CITY	ST	ZIP	SUPT. X FIRST	SUPT. LAST NAME	SUPT. TITLE	Bus. Mng. Pref	Bus Mng. Last	Bus Mng. Title	Title I Part A	Title I Part D	Title I 24101 Planning Award
Academy of Trades and Technology	2551 Karsten Ct., SE	Albuquerque	NM	87102	Mr. Christopher	Hotchkiss	Principal	Mr. Alfred	Martin	Business Manager			
ACE Leadership High School	800-B 20th St. NW	Albuquerque	NM	87104	Ms. Tori	Stephens-Shauger	Principal	Mr. David	Vigil	Finance Director	\$29,344.65	\$0.00	\$29,344.65
Alamogordo Public Schools	P.O. Box 650	Alamogordo	NM	88310	Ms. Adrienne	Salas	Superintendent	Ms. Carol	Genest	Finance Director	\$71,342.03	\$0.00	\$71,342.03
Albuquerque Public Schools	P.O. Box 25704	Albuquerque	NM	87125	Mr. Ruben	Hendrickson	Interim Superintendent	Mr. Don	Moya	Chief Financial Officer	\$1,291,925.83	\$160,644.24	\$1,291,925.83

## II. Prepare a letter template

- **Use the appropriate template** (there are samples in your book).
  - Federal (NOT Carl Perkins)
  - Carl Perkins
  - Special Education
  - State Appropriation
  - Or a template that Susan has sent you
- **Double check** the budgeted amount for your award.
- **Make sure the fund and revenue codes** in the template are correct.

«Date»

«Prefix» «First» «Last», «Title»

«Institution»

«Address»

«City», «ST» «ZIP\_code»

Dear «Title» «Last»:

«Institution» has been awarded its final FY14-15 award amount and any carryover and/or other additional funding for the grant funded through «eg. Title (24101)». Please note the following federal grant information specific to the award «Institution» is receiving through the New Mexico Public Education Department (PED):

CFDA: «eg. 84.010A Title I »

Award Name: «eg. Title I»

Grant Award No.: «S012A10031»

Grant Award No.: «eg. S013A10031»

Grant Award No.: «eg. S014A10031»

Federal Funding Agency: USDE

Compliance Requirements: EDGAR 34 CFR Parts (74 - 99)

OMB A-133 and OMB A-87 or OMB A-21 (Cost Principles for Educational Institutions)

(For awards before December 26, 2014)

<http://www.whitehouse.gov/omb/circulars/default>

2.C.F.R. 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards

(For awards after December 26, 2014)

[http://www.ecfr.gov/cgi-bin/text-idx?tpl=/ecfrbrowse/Title02/2cfr200\\_main\\_02.tpl](http://www.ecfr.gov/cgi-bin/text-idx?tpl=/ecfrbrowse/Title02/2cfr200_main_02.tpl)

NOTE: Based on the available USDE funding, final FY14-15 awards are listed below. Please review «Institution's» current budget in the Operating Budget Management System (OBMS) and submit an electronic Budget Adjustment Request (BAR), using the PED OBMS website. Please consider «Institution's» currently pending budget adjustments to ensure the necessary adjustments to reflect 100 percent of the awards as listed below:

FY13-14 Carryover	
FY13-14 Redistribution	
FY14-15 Final Allocation	
Total District Budget	
FY14-15 Approved Budget	
Total Amount of BAR	

Please submit a BAR through OBMS for this amount using fund code <<24xxx>> and revenue object code 44500. Please adhere to the following timelines required for obligation, liquidation and RfR submission:

Submit your BAR and a copy of this letter through OBMS by April 20, 2015.

The FY 13-14 redistribution and carryover amounts indicated above must be obligated by June 30, 2015 and expended by September 30, 2015.

The last day to submit request for reimbursements for FY 14-15 is July 7, 2015.

Best regards,

Hipolito "Paul" Aguilar  
Deputy Secretary, Finance and Operations

HA/SL/gf

cc: Local Program Project Director, «Institution»  
«Bus. Mngr First Name» «Bus. Mngr Last Name»,«Bus. Mngr Title», «Institution»



# III. House Style Manual

- Refer to the House Style Manual if you edit your template.



## **IV. Email the allocation spreadsheet and the letter template**

to Susan Lucero at [susan.lucero@state.nm.us](mailto:susan.lucero@state.nm.us)  
and to Valerie Padilla at  
[valerie.padilla@state.nm.us](mailto:valerie.padilla@state.nm.us)

# **V. Place the letter template** **and the allocation spreadsheet** **in a “Return To” folder**

**“Return To”**

**Program contact’s name and phone number**



# VI. Fill out and attach the F & O routing sheet (updated) to the “Return to Folder”

FINANCE AND OPERATIONS ROUTING PROCESS	
Your Name:	
Your Bureau:	
Your Division:	
Date of Award Letter:	Contact Phone #:
Document Name:	

**ROUND ONE**

Date Rec'd	Title	Approval Initials	Date Approved	Comments
	Bureau Chief			
	Bureau Editor/Division Director			
	F&O Executive Administrative Assistant			
	Fiscal Grants Management			
	Director of Administrative Services			
	Deputy Secretary F&O			

**FINANCE AND OPERATIONS ROUTING PROCESS**

Your Name: BRANDY DE LA RIVA

Your Bureau: CCR

Your Division: PROGRAM AND POLIDY

Date of Award Letter: 4/2/15

Contact Phone #: 827-6729

Document Name: HIGH SCHOOLS THAT WORK AWARD LETTER TEMPLATE

**ROUND ONE**

Date Rec'd	Title	Approval Initials	Date Approved	Comments
3/14/15	Bureau Chief	ES	3/14/15	
3/14/15	Bureau Editor/Division Director	EP	3/14/15	
3/16/15	F&O Executive Administrative Assistant			
	Fiscal Grants Management			
	Director of Administrative Services			
	Deputy Secretary F&O			

**ROUND TWO**

Date Rec'd	Title	Approval Initials	Date Approved	Comments
	Bureau Chief			
	Bureau Editor/Division Director			
	F&O Executive Administrative Assistant			
	Fiscal Grants Management			
	Director of Administrative Services			
	Deputy Secretary F&O			

**ROUND THREE**

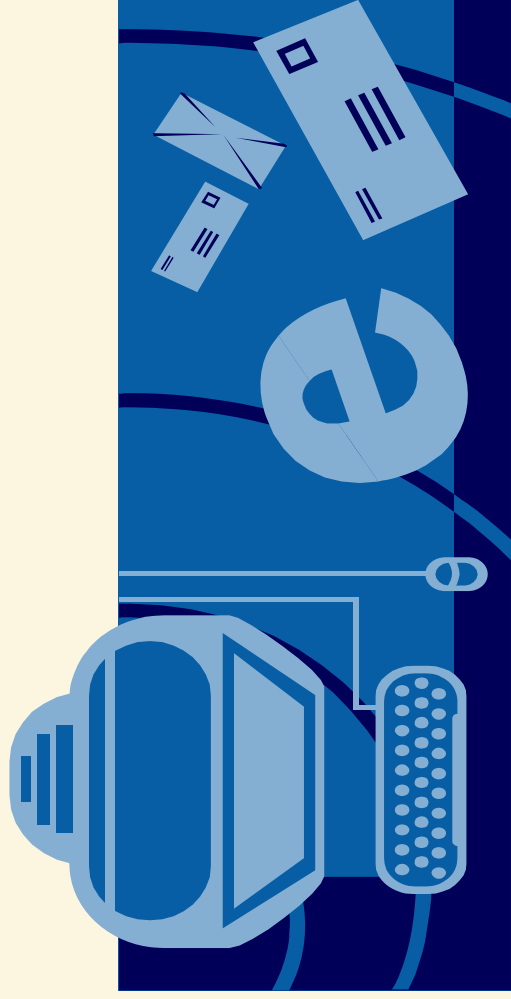
# **VII. Take the “Return To” folder to F&O/ASD**



**PLEASE RETURN TO  
GAIL FLANAGAN  
FINANCE AND  
OPERATIONS  
ROOM 224  
827-6519  
THANK YOU**

**VIII. The template and spreadsheet**  
will be checked and returned to  
program for **correction** or **approved**.

Once the spreadsheet and the template have been **approved**, use them to prepare a mail merge to create the award letters.





Don't know how to do a mail  
merge?

Who you gonna' call???

Sharyn Perea—Federal Building	827-3540
Brandy De La Riva—E-131	827-6711
Consuelo Barraza—E-G5	827-6526
Elizabeth Cassel – Federal Building	827-3573

Anyone else??

**X. All award letters are signed by  
Deputy Secretary, Paul Aguilar**

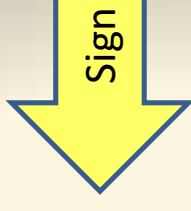
Deputy Aguilar's closing is "Best regards"

**NOT**

**"Best Regards"**

Please put the “Sign Here” tabs on the  
**right** side of the letter

Best regards,



Hipolito “Paul” Aguilar  
Deputy Secretary, Finance and Operations

Please put the “Sign Here” tabs on the  
**right** side of the letter

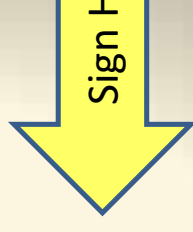
Best regards,



Hipolito “Paul” Aguilar

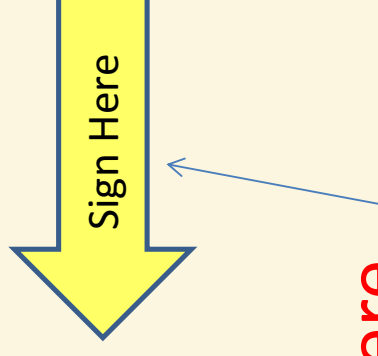
**Not here**

Deputy Secretary, Finance and Operations



Please put the “Sign Here” tabs on the  
**right** side of the letter

Best regards,



Hipolito “Paul” Aguilar

**Not here**

Deputy Secretary, Finance and Operations

Please put the “Sign Here” tabs on the  
**right** side of the letter

Best regards,



Hipolito “Paul” Aguilar

Deputy Secretary, Finance and Operations

**Not here**

Does anyone need a break?



# QUICK REVIEW

## PROGRAM

- ❑ **Prepare an allocation spreadsheet and letter template for your award. Letter template should be SINGLE SIDED.**
- ❑ **Email the allocation spreadsheet and letter template to [susan.lucero@state.nm.us](mailto:susan.lucero@state.nm.us) and to [valerie.padilla@state.nm.us](mailto:valerie.padilla@state.nm.us)**
- ❑ **Bring the letter template and spreadsheet in a “Return To” folder with the F&O routing sheet attached to F&O/ASD.**



# QUICK REVIEW

## F&O/ASD

- The folder is logged in.
- A contact list from the R: drive is printed and placed in the folder.
- Bureau approval, grammar, spelling, addressee information, dates, salutation, and closing are checked.
- The folder is logged out to FGM.

## QUICK REVIEW

### F&O/ASD cont.

- ❑ FGM ensures financial information is correct and that it matches the budget.
- ❑ FGM returns the folder to F&O/ASD for logging.
- ❑ The folder is returned to program for **corrections** or **approved**.
- ❑ **Whenever** the template and spreadsheet are moved, they will always be logged in and out.

# THE "LOG"



Rebecca SL/M Title I Carryover  
3/6/15 Wilson R/PA Template

to SL/GF  
3/6/15

back to RW for changes  
3/6/15

CO letters delivered  
3/6/15

back for corrections  
3/6/15

to MR  
3/10/15

signed and returned  
to PA 3/11/15  
except 3/12/15

Consuelo SL/MR  
Barraza /PA STEM letters

to SL  
2/13/15

to MR 2/15/16 to PA 2/16/16 2/17/15

back to CB

## QUICK REVIEW

### PROGRAM

- Once the letter template and spreadsheet are approved, **prepare the mail merge.**
- Program brings the **corrected** template, the merged letters, and the spreadsheet in the “Return To” folder to **F&O/ASD** for logging.

## QUICK REVIEW

### F&O/ASD

- Checks that all corrections were made; the folder is logged out to CFO.
- CFO double checks the letters and the spreadsheet one final time. If there are no errors, the letters will be logged to the DS for signing.**
- Signed letters are logged out and returned to program**

# QUICK REVIEW

## PROGRAM

- ❑ Scans letters to the R: drive.
- ❑ Email in-house folks the location on the R: drive **where** they will find a copy of the letters.

# **QUICK REVIEW**

## **PLAN AHEAD**

**Allow six (6) working days** for your award letters to pass through the F&O/ASD review.

**Date your letter accordingly.**

# WHAT DOES FGM LOOK FOR?

- Use of correct template
- Compliance information – federal or state
- Deadlines – BAR/Expenditures/Final RfR

If the templates provided do not fit your award...

- Opening statement describes purpose and nature of the award
- Intended use of funds (optional) – concise paragraph



# WHAT DOES CFO LOOK FOR?

- Correct PED letterhead
- Correct addressee information
- Correct salutation – Dear Superintendent  
Roy:
- Headers on second page match the information on the first page
- Correct grammar and spelling
- Calculations are correct; and dollar amounts in letter tie to spreadsheet.
- Proper alignment of numbers (right justified)
- Closing is in proper format

# QUESTIONS???



