

National Quality Improvement Center

QIC•AG

Adoption & Guardianship Support and Preservation

A Program funded through a five-year cooperative agreement with
Department of Health and Human Services,
Administration for Children and Families, Children's Bureau in partnership with:
Spaulding for Children
The University of Texas at Austin,
The University of Wisconsin-Milwaukee, and
The University of North Carolina at Chapel Hill


Updated 2/16

PRESENTING.....

The Super Exciting Cost Planning Document and Billing Process

Topics that will be covered during this presentation:

- How funds are allocated for partner sites
- What expenses are and are not allowable
- How to complete the cost template and budget narrative
- How expenses for partner sites will be processed
- Expectations of sites regarding costs



QIC•AG 2


HOW FUNDS ARE ALLOCATED FOR PARTNER SITES

- We have allocated a portion of the budget every year that is specifically for the sites.
- The amount of money per site will vary based upon size, intensity of the intervention, and resources that are needed to implement the valuable intervention.
- On average, sites will have \$300,000 this year for installation and implementation costs (March – September) and \$250,000 every year after for implementation.

QIC•AG 3

HOW FUNDS ARE ALLOCATED FOR PARTNER SITES


Sites will have two 'buckets' of money for this project.



Bucket 1 includes funding for:

- SIM
- Travel to PMT, SAT and other meetings when QIC-AG teams are on site
- Food for any of the meetings listed above
- Travel to Professional Consortium Meetings

NOT included in cost template



Bucket 2 includes funding for:

- All other costs that are associated with the evaluable intervention, laid out in the work plan and included in the cost template.

Included in cost template

QIC•AG 4

WHAT EXPENSES ARE AND ARE NOT ALLOWABLE

Expenses that are NOT allowable unless specific permission is given in advance by Spaulding:

- Any equipment over \$5,000
- Furniture
- Line item called indirect costs
- Business cards
- Travel outside of the U.S.



QIC•AG 5

WHAT EXPENSES ARE AND ARE NOT ALLOWABLE

Five golden rules regarding expenses:

1. Must align with the activities listed in the work plan.
2. Must be reasonable- certain expenses will require estimates from several vendors.
3. Must be directly related to the evaluable intervention.
4. Must be allowable under federal regulations.
5. Must be described and justified in the budget narrative- there is no line item for miscellaneous.

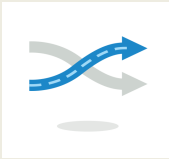


QIC•AG 6

WHAT EXPENSES ARE AND ARE NOT ALLOWABLE

Flexibility and good communication will be key with this process.

With no road map from other grantees that have operated expenses in this manner, we will all be learning as we go.



QIC•AG 7

COMPLETION OF COST TEMPLATE AND BUDGET NARRATIVE

- The excel workbook contains 5 tabs. Please carefully review all of the tabs before completing.
- During this year (FFY15/16), sites will need to complete two cost templates and budget narratives:
 - One for installation costs
 - One for implementation costs
- An example of a budget narrative has been provided.
- The cost template and budget narrative example can be found in sharefiles under Partner Sites/Cost Planning

QIC•AG 8

COMPLETION OF COST TEMPLATE AND BUDGET NARRATIVE

Cost Template for Installation:

- Includes expenses that are necessary to get the site ready for implementation.
- Should be developed with input from all key individuals and organizations.
- Expenses should be researched so that they reflect actual costs.
- Non QIC-AG costs are expenses that the site incurs that are not charged to QIC-AG.

QIC•AG 9

COMPLETION OF COST TEMPLATE AND BUDGET NARRATIVE

Review Cost Template for Installation Expenses

QIC•AG 10

COMPLETION OF COST TEMPLATE AND BUDGET NARRATIVE

Review Budget Narrative

QIC•AG 11

COMPLETION OF COST TEMPLATE AND BUDGET NARRATIVE

Cost Template for Implementation:

- Includes expenses that incur after the first client 'enters' the evaluable intervention.
- Should be developed with input from all key individuals and organizations.
- Expenses should be researched so that they reflect actual costs.
- Non QIC-AG costs are expenses that the site incurs that are not charged to QIC-AG.

QIC•AG 12

COMPLETION OF COST TEMPLATE AND BUDGET NARRATIVE

Cost plans must be reviewed and approved by Spaulding before they are considered final.



All expenses must align with the activities that are listed on the work plan that is submitted as part of the implementation planning document.

Sites DO NOT have to submit a revised cost plan if they are going over/under on a certain line item. However, if a site is going to exceed their overall cost plan, the QIC-AG Director must be notified immediately.

QIC•AG

13

HOW EXPENSES FOR THE PARTNER SITES WILL BE PROCESSED

- All expenses have to be approved by Spaulding.
- Sites can process expenses 2 ways:
 1. Pay for it directly and request for reimbursement. This is done through the Site Reimbursement Request Form (version 3). Same form used for SIM payment. This form is submitted monthly to Spaulding.
 2. Ask Spaulding to pay for it directly. This is done through the Payment Request Form.

Both forms are submitted to Ingrid Parks at Spaulding.

QIC•AG

14

HOW EXPENSES FOR THE PARTNER SITES WILL BE PROCESSED

- Original receipts for items purchased must be submitted with the Site Reimbursement Form.
- Sites must keep all cost documentation for the grant for three years.



QIC•AG

15

EXPECTATIONS OF SITES


- Sites should notify the Director of the QIC-AG immediately if they think they might exceed their total for the cost plan.
- Sites should ensure cost plan is aligned with the activities on their work plan. All expenses submitted should be on the cost plan.
- Sites will meet with Spaulding on a quarterly basis to review their cost plans and expenses submitted to date.
 - During FFY15/16 meetings will be held in June and September.
 - Every year thereafter they will be held December, March June and September.

QIC•AG 16

EXPECTATION OF SITES

Spaulding will meet with each site individually to address any questions and ensure sites are aware of the two processes for invoicing.

Cost plans should be submitted with the implementation plan that is due the end of February.




QIC•AG 17

QUESTIONS

Additional Information on the QIC-AG can be found at:

www.qic-ag.org



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QIC•AG 18
