WSGC Grant Management Webinar

January 10, 2023

Presented by Christine Bolz, FNL Program Director

Webinar Overview

What will be covered:

- How to add team members to your Rocket Launch Team (Create NOI)
- How to add a co-advisor to your FNL NOI application
- How to add an authorized user (Grants Officer) to your FNL NOI application
- How to upload documents to the Grant Management page
- What is the Period of Performance for the award
- What method of reimbursement requests are available to teams
- When to invoice WSGC/submit a reimbursement request
- How to fill out a WSGC project/travel expense form
- How to fill out a WSGC invoice template
- How to submit WSGC invoices/reimbursement requests for federal funds and cost-share

How to Add Team Members to Your First Nations Launch Notice of Intent to Compete

Adding Team Members

*This step should be completed at time of application submission or as part of the award acceptance process, or any time there is a change in the Team Member roster.

STEP 1: **PI** logs into their account > Select "Manage Application" > Select "Rocket Launch Team (Create NOI)" application

STEP 2: **Team Members** register/log in to website > Apply for "First Nations Rocket Launch Competition"
Upload media release

Instructions are listed in award letters and on the WSGC registration page: *spacegrant.carthage.edu/about/login/*

How to Add a Co-Advisor to your WSGC Grant Application

Adding a Co-Advisor

*This step should be completed as part of the award acceptance process.

STEP 1: **Co-Advisor** must register with WSGC

STEP 2: **PI** logs into their account > Select "Manage Application" > Select "Rocket Launch Team (Create NOI)" > Select Co-Advisor from dropdown list

NOTE: If you do not see your Co-Advisor listed in the dropdown, they have not completed STEP 1 above.

> Co-Advisor
>
> [   ]
>
> Co-Advisor must be registered for auto-population of this field.

Instructions are listed in award letters and on the WSGC registration page: spacegrant.carthage.edu/about/login/

How to Add an Authorized User (Grants Officer) to Your "Rocket Launch Team (Create NOI)" Grant Application

Adding an Authorized User (Grants Officer)

*This step should be completed as part of the award acceptance process.

STEP 1: **Grants Officer** must register with WSGC

STEP 2: **PI** logs into their account > Select "Manage Application" > Select "Rocket Launch Team (Create NOI)"> Select Grants Officer from dropdown list

NOTE: If you do not see your Grants Officer listed in the dropdown, they have not completed STEP 1 above.

Instructions are listed in award letters and on the WSGC registration page: spacegrant.carthage.edu/about/login/

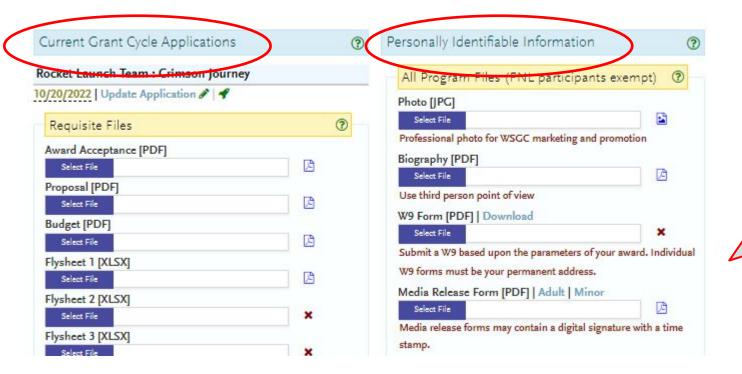# How to Upload Documents to the Grant Management Page

Uploading Documents to the Grant Management Page

STEP 1: **PI, Co-Advisor** logs into their account > Select "Manage Application" > Select "Rocket Launch Team (Create NOI)"> **or** **Team Lead** logs into their account > Select "Manage Application" > Select "First Nations Rocket Launch Competition"> Select Field for Document that Needs to be Uploaded to the Grant Management Page

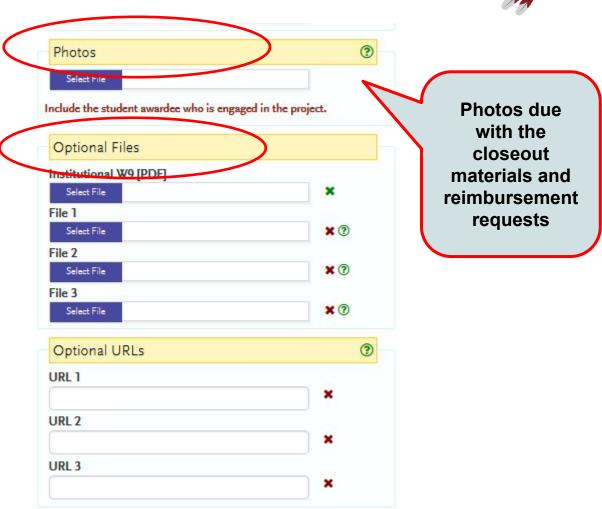**Media Release and W9 must be current!!!**

Uploading Documents to the Grant Management Page

STEP 2: Upload PDF, RKT, URL, JPG, XLSX to appropriate field.

STEP 3: Upload 2-3 photos of team members in action during the design, build, fly stages.

NOTE: Optional File Fields can be used when a specific field is not available (i.e. Invoice, Reach for the Stars Request, etc.)

Photos

Select File

Include the student awardee who is engaged in the project.

Optional Files

Institutional W9 [PDF]

Select File

File 1

Select File

File 2

Select File

File 3

Select File

Optional URLs

URL 1

URL 2

URL 3

Photos due with the closeout materials and reimbursement requests

What is the
Period of Performance
for the Award

Period of Performance

NOTE: This date is dependent upon the date WSGC receives the award acceptance material.

PERIOD OF PERFORMANCE	MOON/MARS	GATEWAY
Award Begin Date	October 28, 2022	January 2, 2023
Expenditure Begin Date	October 28, 2022	January 2, 2023
Fully Reimbursable Begin Date	November 14, 2022	January 20, 2023
Award Acceptance Date	November 14, 2022	January 20, 2023
Award End Date	May 8, 2023	May 8, 2023
Closeout Date	May 8, 2023	May 8, 2023

- Final Reimbursements Due
- 2-3 Project Photos featuring team members/1-minute video
- PLAR Report (Moon/Mars)

What Method of Reimbursement Requests are Available to Teams

Method of Reimbursement Requests

METHOD	FORM(S)	SIGNATURES
University/College	WSGC Invoice/Cost-Share Reporting Form	AOR
Student Organization	WSGC Invoice/Cost-Share Reporting Form	AOR
International Status	N/A	N/A
BIE Funded	N/A	N/A
Individual	Project/Travel Expense Form	Advisor, Team Lead, Individual

Forms can be found on the FNL Tools and Tips page: spacegrant.carthage.edu/first-nations-launch/tools-and-tips/

When to Invoice WSGC

WSGC Invoicing

Partial Reimbursement Invoice	Final Reimbursement Invoice
March 6, 2023	May 8, 2023

First Nations Launch does not follow the fiscal year for WSGC invoicing

How to Fill Out a WSGC Travel/Project Expense Form

WSGC Travel Guidelines

1. Procedures for Implementation

2. Qualifications Necessary to Determine an Allowable Expense

3. Authorization to Travel

4. Authorization for Travel Expenses

5. Mode of Transportation
   - Air Travel, Travel by Train or Bus, Taxis and Airport Shuttles, Use of Privately-Owned Vehicles, Rental Car

6. Alcoholic Beverages

7. Meals & Incidental Expenses

8. Hotel & Motel Expenses

9. Other Allowable Expenses

10. Outside Contract Personnel expenses

11. International Travel

https://spacegrant.carthage.edu/live/files/5231-travel-guidelines

WSGC Travel Expense Template

1. Date of Purchase

2. Total Purchase

3. List Participants

4. Itemized Receipt

5. Tip Maximum 20%

TRAVEL EXPENSE FORM

To receive reimbursement, this form must be submitted by each team member who made a purchase.

NOTE: The team leader cannot be reimbursed for purchases made by team members and then distribute the money.

Email Form and Receipts To:
Megan Goller
mgoller@carthage.edu
(262) 551-6237

Please Make Check Payable To:
Name: Jane Doe
Address line 1: 1234 Instruction Way
Address line 2: Apt 401
City, State, Zip: Kenosha, WI 53140

Travel Start Date:	Travel End Date:	Team Institution:
03/16/22	03/20/22	Test College

Travel Purpose: Instruction Workshop

Receipt Category	Description	Sun	Mon	Tues	Wed	Thurs	Fri	Sat	Line Total
1	Mileage Total	57.6			57.6				115.0
	miles x 0.655								$ 75.33
2	Air/Rail Fare								$ 0.00
3	Baggage Fee(s)								$ 0.00
4	Rental Car								$ 0.00
5	Uber/Lyft/Taxi/Metro								$ 0.00
6	Parking/Tolls						$ 36.05		$ 36.05
7	Misc. Ground Transport								$ 0.00
8	Lodging				$ 275.12	$ 275.12	$ 286.65	$ 286.65	$ 1,123.54
	Meals ($45 per diem)								
9	-Breakfast	$ 6.75							$ 6.75
10	-Lunch								$ 0.00
11	-Dinner				$ 50.30				$ 50.30
12	-Other								$ 0.00
13	Tips								$ 0.00
14	Miscellaneous 1								$ 0.00
15	Miscellaneous 2								$ 0.00
	TOTAL --------->								**$ 1,291.97**

REQUISITIONER STATEMENT: I declare (under penalties of perjury) that this account of expenses is accurate and conforms to all applicable WSGC regulations. The expenses are actual, reasonable and were personally incurred in accordance to my award letter criteria.

Jane Doe	(123) 456-7890	03/20/22
Team Member Signature	Phone #	Date
Susan Smith	(234) 567-8901	03/20/22
Team Leader Signature	Phone #	Date
John Doe	(345) 678-9012	03/20/22
Team Advisor Signature	Phone #	Date

Misplaced your blank WSGC travel expense form? Find it on the website under Tools & Tips!
https://spacegrant.carthage.edu/first-nations-launch/tools-and-tips/

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WSGC Travel Expense Template

1. Google Map
   - To and From Location
   - Mileage - $0.655/mile
   - Include Purpose
   - .5 mile Round Down/.6 mile Round UP

2. Over 100 mi Round Trip – Rental Car

3. Hotel Limitation – Block via FNL

4. Flight Limitation – Economy, No Seat Upgrade, etc.

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WSGC Project Expense Template

1. Receipt #

2. Date of Purchase

3. Vendor/Store

4. Description

5. Amount

PROJECT EXPENSE FORM

To receive reimbursement, this form must be submitted by each team member who made a purchase.

NOTE: The team leader cannot be reimbursed for purchases made by team members and then distribute the money.

Email Form and Receipts To:	Please Make Check Payable To:
Megan Goller	*Name:* Jane Doe
mgoller@carthage.edu	*Address line 1:* 1234 Instruction Way
(262) 551-6237	*Address line 2:* Apt 401
	City, State, Zip: Kenosha, WI 53140

Team Institution:

Test Team

Rcpt #:	Date	Vendor/Store	Description	Amount
1	04/21/22	Lowe's	Batteries, lighter, tape, glue, screws	$ 42.58
2	03/31/22	L&M Fleet Supply	Washers, glue, quick links	$ 34.60
3	03/04/22	Adafruit	Servo motor, charger, gyroscope	$ 109.25

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WSGC Project Expense Template

6. Total

7. Initial and Date Receipt

8. Sign, Phone #, Date

9. Team Lead Signature

10. Advisor Signature

| | TOTAL | $ 186.43 |

REQUISITIONER STATEMENT: I declare (under penalties of perjury) that this account of expenses is accurate and conforms to all applicable WSGC regulations. The expenses are actual, reasonable and were personally incurred in accordance to my award letter criteria.

Jane Doe	(123) 456-7890	04/22/22
Team Member Signature	Phone #	Date
Susan Smith	(234) 567-8901	04/22/22
Team Leader Signature	Phone #	Date
John Doe	(345) 678-9012	04/22/22
Team Advisor Signature	Phone #	Date

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How to Fill Out a WSGC Invoice Template

WSGC Invoice Template - Proposed Budget

1. Proposed Budget Tab

2. Organization – University/College

3. Period of Performance – Award Begin Date to Award End Date
   See Award Letter

4. Enter Proposed Budget under the WSGC Federal Funded Activity Column

   ○ This information will automatically populate on the Invoice Template tab

   ○ Total will automatically sum WSGC Federal Funded Activity and Cost-Share Columns

5. Cost-Share is not required

Proposed Budget

Organization _____

Period of Performance ___ / ___ / ___ to ___ / ___ / ___

Budgets must be expended and periods of performance must be completed as indicated in the Announcement of Opportunity

BUDGET ITEM	WSGC Federal Funded Activity	Cost-Share/Match In Kind Funded Activity	TOTAL
	Match is required on all faculty, outreach, and industry proposals. Add additional match columns if there is more than one source of matching funds. Indicate the source of each match.		
Salaries and Fringe Total	0.00	0.00	0.00
Include name and role for each individual receiving salary and fringe through WSGC and Match funding.			
Name/Role #1			0.00
Name/Role #2			0.00
Name/Role #3			0.00
Travel Total	0.00	0.00	0.00
Include Location Annual Wisconsin Space Conference (travel/presentation)			
Location #1			0.00
Location #2			0.00
Location #3			0.00
Participant Support Total	0.00	0.00	0.00
Include name and role for each			

Misplaced your blank WSGC invoice template? Find it on the website under Tools & Tips!
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WSGC Invoice Template

1. Select Invoice Template Tab

2. WSGC Award # - FNL23_0-0

3. Period of Performance – Award Begin Date to Award End Date
See Award Letter

4. Organization – University/College

5. Organization Invoice # - If no invoice number then enter N/A

6. Partial Reimbursement select Q3 and Partial

7. Final Reimbursement select Q4 and Final

8. WSGC Funds Awarded - $4,000
Note: If advisor stipend is paid through the university/college, include the stipend amount ($500 – on campus duties/$500 travel to launch activities)

9. Cost-Share Funds Committed - $0

WSGC Invoice/Cost-Share Reporting

NASA Grant # 80NSSC20M0123   WSGC Award # _____   Period of Performance _____ to _____

Organization _____   Organization Invoice/Reference # _____

| Reporting | ☐Q1 | Q1 (Jul-Sep) | ☐Q2 | Q2 (Oct-Dec) | ☐Q3 | Q3 (Jan-Mar) | ☐Q4 | Q4 (Apr-Jun) | ☐IN #1 | Invoice #1 | ☐IN #2 | Invoice #2 | ☐IN #3 | Invoice #3 | ☐IN # FINAL | Final Invoice |

Please refer to the terms and conditions of the Award Agreement for reporting information. A budget modification request must be submitted to the WSGC Office for variations ≥ 10% of the detail budget accepted by WSGC.

BUDGET ITEM	APPROVED BUDGET		INVOICE #1		INVOICE #2		INVOICE #3		FINAL INVOICE		CUMULATIVE TOTAL		BUDGET BALANCE	
	WSGC Federal Funded Activity	Cost-Share/Match In Kind Funded Activity	WSGC Funded	Cost-Share Funded	WSGC Funded	Cost-Share Funded	WSGC Funded	Cost-Share Funded	WSGC Funded	Cost-Share Funded	WSGC Funded	Cost-Share Funded	WSGC Funded	Cost-Share Funded
	WSGC Funds Awarded	*Cost-Share Funds Comitted*	*Attach Invoice and Supporting Documentation*								*Total Expenditures Reported to Date*		*Total Balance*	
Salaries and Fringe Total	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Include name and role for each individual receiving salary and fringe through WSGC and Match funding Name/Role #1	0.00	0.00									0.00	0.00	0.00	0.00

Misplaced your blank WSGC invoice template? Find it on the website under Tools & Tips!

spacegrant.carthage.edu/first-nations-launch/tools-and-tips/

How to Submit WSGC Invoices/Reimbursement Request for Federal

WSGC Invoicing/ Reimbursement Requests

- Invoice/Reimbursement Request packets must be emailed to Megan Goller (mgoller@carthage.edu) as **ONE PDF** (per award) with subject line FNL23_Invoice/Reimbursement Request.
  - *PDF portfolios will not be accepted, please use Adobe's "Combine" tool*
  - Institutions should submit one partial and one final invoice/cost-share report
    - If $0 is spent for the reimbursement period, an invoice must still be submitted
  - Note: Cost-share reporting is not required
- Invoice/Reimbursement Request packets should include:
  - WSGC invoice with federal funds for the reimbursement period and cumulative expenditures
  - Institutional invoice (if applicable)
  - Supporting documentation for federal funds (receipts, etc.)

WSGC Invoicing

- WSGC **cannot** process invoices that:
  - are incomplete or missing signatures
  - include expenses outside of the approved budget and period of performance
  - are missing supporting documentation
  - that include expenses for student team members/co-advisors who have not completed the application process
    - *As a reminder, the application process includes:*
      1. Registering on the WSGC website
      2. Completing the appropriate application (Rocket Launch Team (Create NOI), First Nations Rocket Launch)
      3. **PI** upload award acceptance, signed media release form, individual W9 and institutional W9 if submitting invoices through the university/college/student group
      4. **Co-advisor** upload signed media release form, individual W9
      5. **Team lead** upload signed media release form
      6. **Team members** upload signed media release form

Additional Notes

Additional Notes

- Check signature date on W9, Media Release and Reimbursement Forms. The date must be after the period of performance begin date
- Check your award letter for your closeout date and the documents required for closeout
  - Common award closeout documents include:
    - Post-Launch Assessment Report
    - 2-3 project/program photos
    - Final reimbursement request
  - Post-Launch Assessment Report, photos and final reimbursement requests must be uploaded to the proper grant management page

Questions?

WSGC Invoicing/ Reimbursement Requests

- Invoice/Reimbursement Request packets must be uploaded to the Rocket Launch Team (Create NOI) grant management page (on the WSGC website) as **ONE PDF** (per award) under "Other" File.
  - Other 1 (Partial Reimbursement Request) - March 6 Invoice/Reimbursement Request
  - Other 2 (Final Reimbursement Request) - May 8 Invoice/Reimbursement Request
  - *PDF portfolios will not be accepted, please use Adobe's "Combine" tool*
  - Institutions should submit one partial and one final invoice/cost-share report
    - If $0 is spent for the reimbursement period, an invoice must still be submitted
  - Note: Cost-share reporting is not required
- Invoice/Reimbursement Request packets should include:
  - WSGC invoice with federal funds for the reimbursement period and cumulative expenditures
  - Institutional invoice (if applicable)
  - Supporting documentation for federal funds (receipts, etc.)