



Community Award Recipient Guidelines & Processes

General Funding Guidelines:

- Funds must be depleted within 1 year of project start date
- Projects can be supported by external funding sources, such as grants or other awards, so long as the Community Award funds are allocated to expenses that are not already covered by existing funding.
 - *Example:* I have a program funded through a grant from the ABC Foundation. I want to expand my program to offer a new service, but I must conduct a Needs Assessment in order to best inform the planning and design of this new component. While my ABC Foundation grant will cover some of the Needs Assessment costs, I will need additional funding to support this effort. I plan to use the Morgan CARES Community Award funds to supplement the additional expenses so that I am able to conduct a robust Needs Assessment to improve my program.

Approved Expenses:

- Stipends or wages
- Local travel/transportation costs directly related to project activities
- Supplies (notebooks, pens, paper etc.)
- Small Equipment (less than \$1,000)
- Food and/or refreshments directly related to project activities
- Participant incentives
- Printing & reproduction
- Postage and/or courier services

Prohibited Expenses:

- Project expenses that are already funded by another source
- Association or other membership fees
- Facilities costs
- Administrative and other indirect costs
- Donations to other organizations or causes
- Purchase or production of products to sell for profit

Needing Prior Approval:

- Fundraising
- Lobbying
- Solicitations
- Equipment and/or supplies costing more than \$1,000

Requesting Funds:

- **PLEASE NOTE: ALL COMMUNITY AWARD FUNDING REQUEST FORMS MUST BE SUBMITTED TO PROGRAM COORDINATOR BY 5PM ON WEDNESDAY TO BE PROCESSED THE FOLLOWING WEEK.**
- Community Leads or Academic Co-Leads may submit requests using the Community Award Funding Request Form provided.
- Financial Reports-



- The Morgan CARES Team, and Fusion Partnerships will be tracking spending for each project team, however it is highly encouraged for project teams to develop and maintain their own system for tracking spending.
- Financial reports from both the Morgan CARES Team and Fusion Partnerships will be provided at the projects' mid-point, and as needed upon request.
- Types of Requests-
 - *To pay a bill or invoice* (ex- monthly subscription to video conference platform, catering invoice, etc.)
 - Submit the bill or invoice, along with the Community Award Funding Request Form
 - Submit within two weeks of the payment due date
 - *To request an online purchase* (ex- Amazon e-gift cards for participant incentives, 15 spiral notebooks, etc.)
 - Include a link to the item, quantity needed, and delivery address in the "Details of Purchase" column on the Community Award Funding Request Form
 - Submit ahead of time, allowing one week to process your request, and additional time for package delivery (if applicable)
 - *Expense Reimbursements*
 - Submit proof of purchase along with Community Award Funding Request Form
 - Must include name, contact information, and mailing address for reimbursement recipient
 - Please Note: Reimbursements will be processed for items listed on the "Approved Expenses" list. Expenses that are not on this list must be pre-approved prior to purchase in order to be eligible for reimbursement.
 - *Payment for Services* (stipends, facilitator fees, other wages)
 - Must include justification in the "Details of Purchase" column (ex- \$10 per hour X 4 hours)
 - Must submit a w9 tax form for the person receiving payment along with the Community Award Funding Request Form
 - Include name, contact information, and mailing address for the individual receiving the payment
 - Please Note: Incomplete requests for payment for services will not be processed, and could result in delay of payment.
- Completing the Request Form-
 - A new Community Award Funding Request Form should be completed for:
 - Each type of request (bill, invoice, reimbursement etc.)
 - Each individual recipient (one mailing address per form)
 - Guidelines to assist you with determining the appropriate type of request and expense justification is provided on the second page.
 - "Primary Contact Name": This is the person who should be contacted with any questions regarding the request



- “Make Check Payable To”: This is the person (or company, organization, etc.) receiving the payment
- “Vendor/Justification”: Here, you will write the name of the company you are paying OR a justification for the payment
 - Example 1: ABC Printing Services (vendor name)
 - Example 2: Stipend (justification)
- “Details of Purchase”: Here, you will describe the nature of the purchase in terms of amount and quantity
 - Example 1: \$10 per hour X 4 hours
 - Example 2: Coffee & muffins for 10 participants who attended session 1
- “Amount”: Indicate the amount owed for each expense on the corresponding line, and the total amount owed at the bottom.
 - Multiple expenses can be listed on one request form, so long as the request type (bill, invoice, wages, reimbursement, etc.) is the same, and the payment is owed to the same recipient.
 - Example: Jordan spent \$100 at the supermarket buying refreshments for 10 program participants. Jordan also spent \$20 on 10 notebooks, one for each program participant. The justification provided in line one would be “Project Expense”, whereas the justification in line two would be “Materials & Supplies”. Since both expenses are reimbursable, and Jordan is the only person being reimbursed, these expenses can be included on the same form.
- “Submitted By”: This is the person submitting the request. Must be either Community Lead or Academic Co-Lead.