



# **Getting Started Workshop**

**David Campbell**  
**Program Director**  
**Division of Research on Learning**  
**in Formal and Informal Settings**

**Erin McDougal**  
**Science Assistant**  
**Division of Undergraduate Education**

**AACC/NSF National ATE Principal Investigators**  
**Conference**  
**October 26, 2011**

# Agenda for this afternoon

- General information (NSF); alternating with Mentoring team (experienced NSF-supported PIs)
- Evaluation team
- Office of Budget, Finance, and Award Management
- Office of the Inspector General

In 1992, the Scientific and Advanced Technology Act (SATA) was signed into law by Congress. This act was to establish **"a national advanced technician training program, utilizing the resources of the Nation's two-year associate degree-granting colleges to expand the pool of skilled technicians in strategic advanced technology fields, to increase the productivity of the Nation's industries, and to improve the competitiveness of the United States in international trade, and for other purposes."** This act gave rise to the National Science Foundation's Advanced Technological Education (ATE) program.

# ***ADVANCED TECHNOLOGICAL EDUCATION***

- The ATE program promotes improvement in the education of science and engineering technicians at the undergraduate and secondary school level and the educators who prepare them, focusing on technicians for high-technology fields that drive the nation's economy.
- ATE is in its 19<sup>th</sup> year of funding community colleges, having started with the Science and Advanced Technology Act of 1992 (SATA).
- FY2011-FY2013
  - Formal Proposals      October 20, 18, and 17 respectively

<http://www.nsf.gov/pubs/2011/nsf11692/nsf11692.htm>



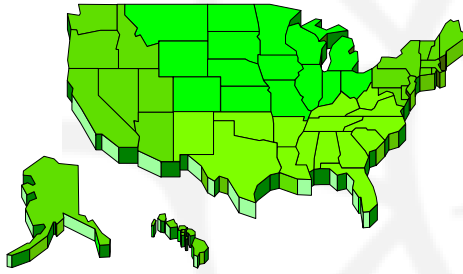
## ADVANCED TECHNOLOGICAL EDUCATION

### ➤ **FY2012**

- Formal Proposals

Oct 20, 2011

➤ **About \$64 million for FY12 ????**



# Advanced Technological Education Program

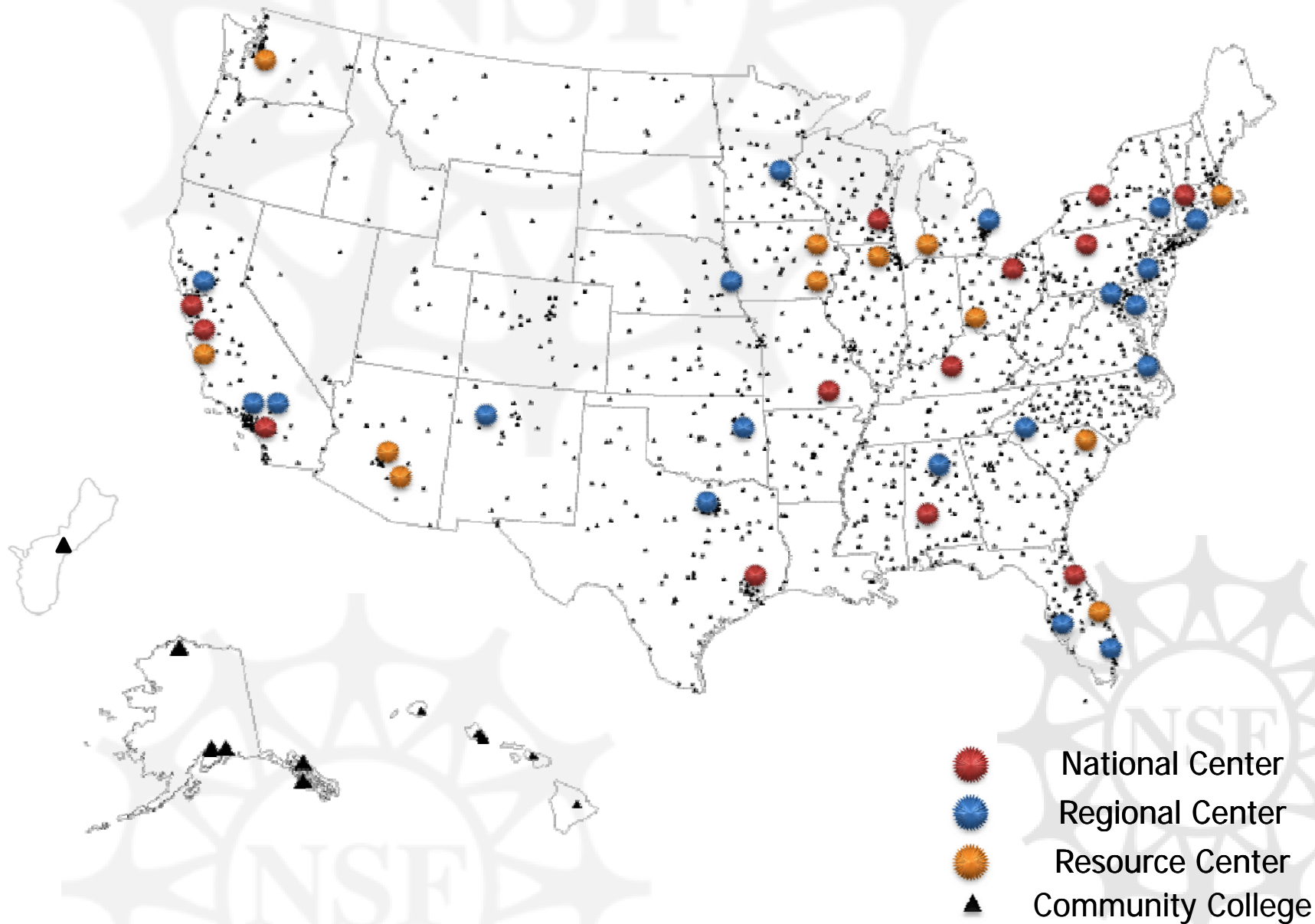
## Projects which focus on:

- Program Improvement;
- Professional Development for Educators;
- Curriculum and Educational Materials Development;
- Teacher Preparation; or
- Small Grants for Institutions New to the ATE Program.
- **Centers of Excellence – National, Regional, Resource**
  - <http://www.ATECenters.org>
- **Targeted Research on Technician Education**

## Advanced Technological Education Foci of Awards

	FY 96-06	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011
Biotechnology	47	5	8	7	5	8
Chemical Technology/Pulp & Paper/Environmental	58	3	1	1	2	2
Multidisciplinary/Institution Reform	43	4	2	3	3	4
Electronics/Microelectronics/Nanotech/Mechatronics/Lasers	23	7	8	4	5	8
Other Engineering Technology	75	7	10	10	7	7
Geospatial (GIS/GPS/Surveying)	28	3	4	4	3	1
Manufacturing	92	4	5	7	3	6
Math/Physics/Computational Science/Core	40	1	1	3	6	1
Computer/Information Systems/Cybersecurity/Telecommunications	139	8	8	5	9	11
Marine/Agriculture/Aquaculture/Natural Resources/Viticulture	20	2	2	7	5	6
Teacher Preparation	34	1	4	5	6	1
Multimedia	7	1	4	2	2	3
Energy Technology	6	3	9	4	14	6
Research/Evaluation	5	2	2	2	3	1
Recruitment/Retention	7	3	1	4	7	6
<b>Totals</b>	614	54	69	68	80	71

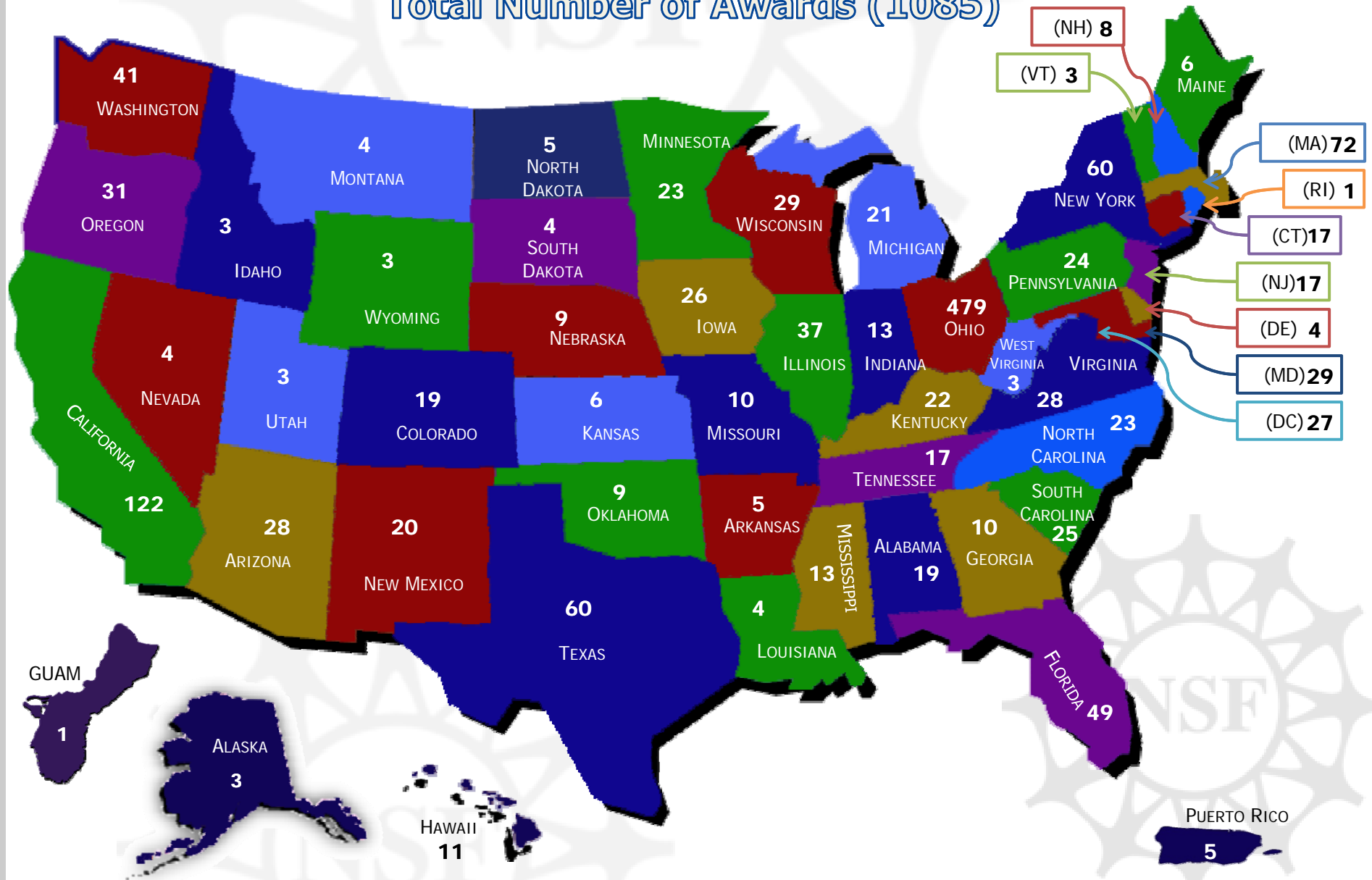
## ATE Centers of Excellence (44)





# Number of Awards per State in ATE's 17 Year History

Total Number of Awards (1085)



# Mentoring ATE Projects

Elaine Craft

Dennis Faber

Vera Zdravkovich



# Evaluation and Reporting

## Annual reports

- Due 90 days before the anniversary of your award
- Standard vs. continuing awards
- Your CGI depends on approval of annual report
- Delinquent annual reports in other divisions of NSF will affect timely funding of your ATE award!

## Final reports

- Due no later than 90 days after the end date of your award
- Overdue final reports will affect timely funding of awards elsewhere in the foundation
- A final report is more than a last annual report!



# Evaluation and Reporting

- Fastlane has a report template
  - For subsequent submissions, the last report you submitted will come up when you start to prepare the new report
  - Delete? Edit? or add annual sections?
- You can attach .pdf files
  - Charts, news articles, photographs; external evaluation report; etc.
  - Don't go berserk! If you must attach 200+ pages worth of material, send an email to the PI indicating the most important 20 pages or so to read!
- NSF will send an email, "Effective annual progress reports"



# Evaluation and Reporting

## Project Outcomes Report for the General Public

- Within 90 days following expiration of the grant, a project outcomes report for the general public must be submitted electronically via Research.gov. This report serves as a brief summary, prepared specifically for the public, of the nature and outcomes of the project. This report will be posted on the NSF website exactly as it is submitted and will be accompanied by the following disclaimer:
- “This Project Outcomes Report for the General Public is displayed verbatim as submitted by the Principal Investigator (PI) for this award. Any opinions, findings, and conclusions or recommendations expressed in this Report are those of the PI and do not necessarily reflect the views of the National Science Foundation; NSF has not approved or endorsed its content.”

# National Visiting Committees or Advisory Boards

## ➤ National Visiting Committee

- Centers are required to have one
- Annual visits
- A group of experts who provide advice, assess the plans and progress of the project, and enhance dissemination
- 8-10 members

## ➤ Advisory boards

- Often a good idea for a project to have one
- If you have one, USE IT!!!

# Site Visits

- A Program Officer will try to visit your project at least once
- Reverse Site Visits
- Needs to be more than a dog and pony show: What works, what isn't working, where you could use help, where you could help others
- Site visit reports become part of the award's official record



# Accountability

- You need to report and document the impact and effectiveness of your project to NSF
- NSF takes your information to document the impact and effectiveness of the ATE program to Congress
- What else can you do?



# Advanced Technological Education Centers

**ATE**CENTERS IMPACT  
2006 – 2007



PARTNERS WITH INDUSTRY FOR  
A NEW AMERICAN WORKFORCE



National  
Science  
Foundation

ADVANCED  
TECHNOLOGICAL  
EDUCATION  
CENTERS

# Advanced Technological Education Centers

					
AGRICULTURAL TECHNOLOGY & BIOTECHNOLOGY	CHEMICAL & PROCESS TECHNOLOGY	ENGINEERING TECHNOLOGY	ENVIRONMENTAL TECHNOLOGY	INFORMATION TECHNOLOGY	MANUFACTURING TECHNOLOGY & NANOTECHNOLOGY
					
 AgrowKnowledge  Bio-Link  NBC <sup>2</sup>	 CAPT  (npt) <sup>2</sup>	 CREATE  HCTT  HVCATE  CP-TEC  SCATE  SpaceTEC	 ATEEC  MATE  HC&R	 BATEC  CITE  CSEC  CSSIA  CTC  CyberWATCH  ITEC  KITCenter  NICIT  HWCET	 CARCAM  CHME  FL-ATE  MATEC  MatEd  NCME  RCNGM  SCME  The TIME Center
<a href="http://www.atecenters.org">www.atecenters.org</a>					



# Mentoring ATE Projects

Elaine Craft

Dennis Faber

Vera Zdravkovich



# Institutional Review Boards (IRBs)

- All projects involving human subjects must either (1) have approval from the organization's Institutional Review Board (IRB) before issuance of an NSF award or, (2) must affirm that the IRB or an appropriate knowledgeable authority previously designated by the organization (not the Principal Investigator) has declared the research exempt from IRB review, in accordance with the applicable subsection, as established in section 101(b) of the Common Rule.



<http://www.nsf.gov/bfa/dias/policy/docs/45cfr690.pdf>

# Working with NSF ATE Program Officers

## Communicate with Program Officers and Keep them informed of Progress

- Not just when things are going wrong!
- Tell us about the good stuff, too.
- Newspaper clippings, television, radio, campus news
- NSF Highlights – might be featured in NSF's budget request to Congress
- Tell us when something is going to happen; e.g., a professional development workshop might be good time for a site visit by a Program Officer
- Emails are usually the best way
- Please put your award number in the subject line of the email



# Crediting NSF



## Acknowledgment of Support

➤ "This material is based upon work supported by the National Science Foundation under Grant No. (NSF grant number)." (Oral acknowledgment if appropriate.)

## Disclaimer

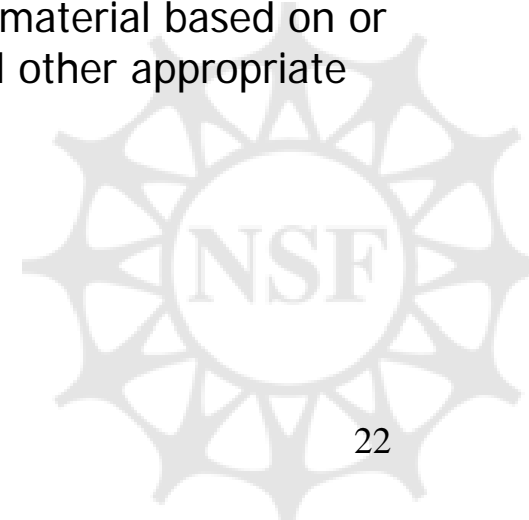
➤ "Any opinions, findings, and conclusions or recommendations expressed in this material are those of the author(s) and do not necessarily reflect the views of the National Science Foundation."

## Copies

➤ The grantee is responsible for assuring that the cognizant NSF Program Officer is provided access to, either electronically or in paper form, a copy of every publication of material based on or developed under this award, clearly labeled with the award number and other appropriate identifying information, promptly after publication.

## Logos

<http://www.nsf.gov/policies/logos.jsp>



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**Study Examines Kid's Beliefs and Behaviors**  
FEATURES 1 2 3 4 II

**Funding Opportunities**  
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Upcoming Due Dates  
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Program Areas  
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Released October 27, 2008  
Press Release  
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Released October 27, 2008  
Press Release  
 [World's Smallest Storage Space ... the Nucleus of an Atom](#)  
Released October 23, 2008  
Press Release  
**Now Showing: Film, TV, Museums and More** See All  
[NSF supports great television, inspiring museum exhibits, breathtaking IMAX films, and compelling radio.](#)  
 [Cyberchase](#)  
A mystery-adventure cartoon produced by Thirteen/WNET, this show is a vehicle for teaching mathematics and problem-solving, with action

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**Awardee Information**

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**Hint:** The text field below 'Search Award For' searches the title, abstract, and award number fields.

[Search Award For:](#)

[Restrict to Title Only:](#) ☐

### Awardee Information

#### Principal Investigator

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[Last Name:](#)

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# www.nsf.gov

Award#0802517 - Turtle Mountain Field Station - Microsoft Internet Explorer

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Address <http://www.nsf.gov/awardsearch/showAward.do?AwardNumber=0802517>

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## Award Abstract #0802517 Turtle Mountain Field Station

NSF Org:	<a href="#">DUE</a> <a href="#">Division of Undergraduate Education</a>
Initial Amendment Date:	August 11, 2008
Latest Amendment Date:	August 11, 2008
Award Number:	0802517
Award Instrument:	Standard Grant
Program Manager:	Sharon M. Locke DUE Division of Undergraduate Education EHR Directorate for Education & Human Resources
Start Date:	August 15, 2008
Expires:	July 31, 2010 (Estimated)
Awarded Amount to Date:	\$150000
Investigator(s):	Bradley Rundquist <a href="mailto:bradley_rundquist@und.nodak.edu">bradley_rundquist@und.nodak.edu</a> (Principal Investigator) Wannetta Bennett (Co-Principal Investigator)
Sponsor:	Turtle Mountain Community College Box 340 Belcourt, ND 58316 701/477-7862
NSF Program(s):	EXP PROG TO STIM COMP RES, ADVANCED TECH EDUCATION PROG
Field Application(s):	0116000 Human Subjects
Program Reference Code(s):	SMET, 9178, 9150, 1032
Program Element Code(s):	9150, 7412

### ABSTRACT

Faculty at Turtle Mountain Community College (TMCC) and the University of North Dakota (UND) are collaborating to develop the Turtle Mountain Field Station (TMFS), a center for research, education, and outreach in geospatial technologies. The TMFS brings together Native American college students, tribal community educators, rural secondary school teachers, rural secondary school computer technicians, and faculty, staff, and graduate students at UND. The TMFS provides a strong foundation for a geospatial technology program that will enhance science, technology, engineering, and

Done

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# Notifications and Requests

- **Examples:**

Change in scope

Budget changes

Time lines

Principal Investigator changes

Participant Support

No-cost extensions

It's best to discuss these with a Program Officer before you make official requests in Fastlane




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Funding Trends  
Program Areas  
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Merit Review  
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[World's Smallest Storage Space ... the Nucleus of an Atom](#)  
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Press Release  
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[Cyberchase](#)  
A mystery-adventure cartoon produced by Thirteen/WNET, this show is a vehicle for teaching mathematics and problem-solving, with action

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- 10/20/08** - **ATTENTION Partnership for Innovation (PFI) APPLICANTS** submitting Letters of Intent (LOIs) to PFI (NSF 08-583): Special LOI Submission Instructions
- 10/10/08** - **Please Note: Information for Preparers of Project Reports to the Division of Undergraduate Education**
- 10/01/08** - **Important Information about the NSF Proposal & Award Policies & Procedures Guide (Opens new browser window)**
- 09/15/08** - **Special Exceptions to the NSF Deadline Date Policy Due to Natural or Anthropogenic Events**
- 09/06/08** - **Log in to FastLane with your NSF ID instead of your Social Security Number (SSN).**
- 07/31/08** - **Graduate Research Fellowship Program FastLane Enhancements, 08/01/2008**
- 10/22/07** - **Effective January 5, 2008, proposers are required to register in the Central Contractor Registration prior to proposal submission.**

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- **Notifications and Requests**
- **Annual and Final Reports**
- **Financial (Business Office) Transactions**
- **Proposal submission**
- **Reviewing – including procedures for Preliminary and Formal proposals**



# Erin McDougal

- Science Assistant in the Division of Undergraduate Education


# Field General Questions

- Refer PIs to Appropriate Program Officer on Awards
- Answer Questions from Reviewers
- Refer Questions to Appropriate Program Officer(s)
- Refer Questions to Other Appropriate Areas of NSF

# Other Support

- Important Date for ATE
  - October 18, 2012
- NSF Highlights
- Make Changes in NSF System
  - E.g. Contact info for PIs
- Assist with Conferences, Panels and Other Meetings





# **Finding your Current Program Officer**



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1 2 3 4 II

### Funding Opportunities

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## Award Search

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**Hint:** The text field below 'Search Award For' searches the title, abstract, and award number fields.

**Search Award For:**

0501626

**Restrict to Title Only:**

☐

### Awardee Information

#### Principal Investigator

**First Name:**

**Last Name:**

**PI Lookup**

**Hint:** Including CO-PI will result in slower searches.

**Include CO-PI:**

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**Organization:**

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**State:**

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**Country:**

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**Search**

**Reset**

**Enter Award Number and Click Search**

## Search Results

[Back](#)

Results are sorted by award date, with the most recent awards at the top. Click on a column heading to re-sort the results.


The up/down arrows at the right of each column title control whether the sort is ascending or descending.

To view the abstract, click on the award number or title. Click on the data in other columns to perform a new search with that parameter.

[Refine Search](#)

**One award found.**

<a href="#">Award Number</a>	<a href="#">Title</a>	<a href="#">NSF Organization</a>	<a href="#">Program(s)</a>	<a href="#">Start Date</a>	<a href="#">Priority</a>
<a href="#">0501626</a>	<a href="#">MATEC - National Resource Center</a>	<a href="#">DUE</a>	<a href="#">ADVANCED TECH EDUCATION PROG</a>	07/01/2005	<a href="#">Less</a>

Export options:  CSV |  Excel |  XML

**Hint:** Most browsers allow you to save the exported file by right-clicking on the link and choosing "save link target" from the menu options. See the [help](#) for more details.

[Reset](#)

**Click The Award Number Link**



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### Award Abstract #0501626

#### MATEC - National Resource Center

NSF Org: [DUE](#)  
[Division of Undergraduate Education](#)

**Initial Amendment Date:** June 8, 2005

**Latest Amendment Date:** June 13, 2008

**Award Number:** 0501626

**Award Instrument:** Continuing grant

**Program Manager:** Elizabeth Teles  
DUE Division of Undergraduate Education  
EHR Directorate for Education & Human Resources

**Start Date:** July 1, 2005

**Expires:** June 30, 2009 (Estimated)

**Name of Your Program Officer Is Displayed**



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- Special Reports
- Discoveries from NSF Research
- Research Overviews
- Speeches & Lectures

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National Science Foundation  
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Education and Human Resources (EHR)

SEARCH

NSF Web Site

Ensuring the health and vitality of our  
nation's education

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[Research on Learning in Formal  
and Informal Settings \(DRL\)](#)  
[Undergraduate Education \(DUE\)](#)  
[Human Resource  
Development \(HRD\)](#)

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**Click Undergraduate Education (DUE) Link**



## Undergraduate Education (DUE)



### DUE Home

[About DUE](#)

[Funding Opportunities](#)

[Awards](#)

[News](#)

[Events](#)

[Discoveries](#)

[Publications](#)

[Career Opportunities](#)

[Project Information Resource System](#)

## Undergraduate Education (DUE)

### Programs and Funding Opportunities

Key: Crosscutting | NSF-wide

[Advanced Technological Education \(ATE\)](#)

[Computational Science Training for Undergraduates in the Mathematical Sciences \(CSUMS\)](#)

[Cooperative Activity with Department of Energy Programs for Education and Human Resource Development \(Request for Supplement\)](#)

[Course, Curriculum, and Laboratory Improvement \(CCLI\)](#)

[Federal Cyber Service: Scholarship for Service \(SFS\)](#)

[Interdisciplinary Training for Undergraduates in Biological and Mathematical Sciences \(UBM\)](#)

[Math and Science Partnership \(MSP\)](#)

Click 'Advanced Technological Education' Link



[DUE Home](#)

[About DUE](#)

[Funding Opportunities](#)

[Awards](#)

[News](#)

[Events](#)

[Discoveries](#)

[Publications](#)

[Career Opportunities](#)

[Project Information Resource System](#)

[View DUE Staff](#)

[Search DUE Staff](#)

[EHR Organizations](#)

[Graduate Education \(DGE\)](#)

[Research on Learning in Formal and Informal Settings \(DRL\)](#)

[Undergraduate Education \(DUE\)](#)

[Human Resource Development \(HRD\)](#)

[Proposals and Awards](#)

[Proposal and Award Policies and Procedures Guide](#)

[Introduction](#)

[Proposal Preparation and Submission](#)

[Grant Proposal Guide](#)

[Grants.gov Application Guide](#)

[Award and Administration](#)

[Award and Administration Guide](#)

[Award Conditions](#)

[Other Types of Proposals](#)

[Merit Review](#)

[NSF Outreach](#)

[Policy Office](#)

[Other Site Features](#)

[Special Reports](#)

[Research Overviews](#)

[Multimedia Gallery](#)

[Classroom Resources](#)

[NSF-Wide Investments](#)

## Advanced Technological Education (ATE)

### CONTACTS

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<a href="#">Eun-Woo Chang</a>	<a href="mailto:ewchang@nsf.gov">ewchang@nsf.gov</a>	(703) 292-4674	835 N
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<a href="#">Terry S. Woodlin</a>	<a href="mailto:twoodlin@nsf.gov">twoodlin@nsf.gov</a>	(703) 292-4657	835 N

### PROGRAM GUIDELINES

Solicitation [10-539](#)

Please be advised that the NSF Proposal & Award Policies & Procedures Guide (PAPPG) includes guidelines implementing the mentoring provisions of the America COMPETES Act (ACA) (Pub. L. No. 110-69, Aug. 9, 2007.) As specified in the ACA, each proposal that requests funding to support postdoctoral researchers must include a description of the mentoring activities that will be provided for such individuals. Proposals that do not comply with this requirement will be returned without review (see the PAPP Guide Part I: Grant Proposal Guide Chapter II for further information about the implementation of this requirement).

### DUE DATES

Preliminary Proposal Deadline Date: April 21, 2011

Full Proposal Deadline Date: October 20, 2011

### SYNOPSIS

With an emphasis on two-year colleges, the Advanced Technological Education (ATE) program focuses on the education of technicians for the high-technology fields that drive our nation's economy. The program involves partnerships between academic institutions and employers to promote improvement in the education of science and engineering technicians at the undergraduate and secondary school levels. The ATE program supports curriculum development; professional development of college faculty and secondary school teachers; career pathways to two-year colleges from secondary schools and from two-year colleges to four-year institutions; and other activities. Another goal is articulation between two-year and four-year programs for K-12 prospective teachers that focus on technological education. The program also invites proposals focusing on research to advance the knowledge base related to technician education.

### EDUCATIONAL OPPORTUNITY

This program provides educational opportunities for Undergraduate Students, K-12 Educators. This program supports institutions which may provide support to individuals at those institutions. To inquire about opportunities in this program, contact one of the awarded institutions, available by clicking on the Awards link.

[What Has Been Funded \(Recent Awards Made Through This Program, with Abstracts\)](#)



# NSF Highlights

View the new website at:

<http://www.research.gov/seeinnovation>



## A highlight shows...

- an exciting outcome of an NSF-supported project
- transformative results
- impacts of this outcome, including benefits to society, economy, industry, nation, region, science & engineering

## Audiences include...

- Congress, other federal and state policymakers
- business & industry
- general public
- NSF (briefings, speeches, websites -- such as [www.nsf.gov](http://www.nsf.gov) and "Science, Engineering, and Education Innovation" at [www.research.gov/seeinnovation](http://www.research.gov/seeinnovation))

## When writing a highlight...

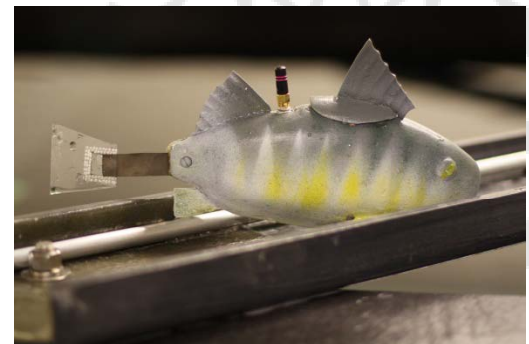
- **DO** write short, straightforward sentences that articulate a single point . **DON'T** use long sentences with multiple clauses.
- **DO** use simple language. **DON'T** use complicated scientific terminology.
- **DO** write for a public audience. **DON'T** write the way you do when publishing in science journals. The public is interested in high-level impacts/benefits, not deep science.

# Robotic Fish Uses Artificial Muscle

**Outcome:** Xiaobo Tan, of Michigan State University, modeled, designed, and constructed a 'fish' that uses electro-active, ionic polymer metal composites for locomotion.

**Impact/Benefits:** Dr. Tan foresees using the fish as a platform to collect environmental data by adding communication, navigation, and environmental monitoring senses.

**Background/Explanation:** Similar to muscle tissue, the composites change shape when a voltage is applied. The fish fins are integrated with a control system to provide the robotic fish with energy-efficient, fish-like maneuverability.





**Questions?**

**[emcdouga@nsf.gov](mailto:emcdouga@nsf.gov)**



# ATE National PI Conference



National Science Foundation  
WHERE DISCOVERIES BEGIN



## **DGA Overview for New PIs**

October 26, 2011

Laura Buckley & Angela Turner  
Grant and Agreement Specialists

## Division of Grants and Agreements (DGA)

- Handles over 30,000 active awards in any given year
- Reviews, negotiates and obligates funding for approximately 11,000 new awards each year
- Responsible for monitoring the business practices of grantees



# Role of Grantee

- The awardee institution has full responsibility for:
  - the conduct of the research project and adherence to all NSF and Federal award terms and conditions;
  - compliance with all Federal cost principles regarding grant expenditures;
  - Expenditures must be allowable, allocable, and reasonable;
  - written institutional policies & procedures.

# NSF Reporting Requirements

- Annual Project Report due from PI via FastLane at least 3 months prior to the end of the budget period;
- Final Project Report due from PI via FastLane within 90 days following the expiration date
- Financial Reporting – Finance/Business Office

# Approval Authorities

Grantee's May:

- Authorize one-time 12 month extension of the expiration date
- Approve pre-award costs incurred within 90 days prior to effective date
- Take title to equipment unless specified in the award letter
- Realign budget line items except out of participant support, new subawards, or if the rebudget results in a scope change

# Prior Approval Requirements

Prior Approvals needed for:

- Change in Objective or Scope
- Absence or Change of P.I.
- New Subaward arrangement not originally approved in award
- 2<sup>nd</sup> No-Cost Extension (can be approved by Program Official)
- Reallocation of funds budgeted for Participant Support costs
- Refer to Award & Administration Guide Exhibit II-1 for complete list

# Award & Administration Guide II-10 NSF 09-1

## Exhibit II-1: *GRANTEE NOTIFICATIONS TO AND REQUESTS FOR APPROVAL FROM THE NATIONAL SCIENCE FOUNDATION\**

All notifications and requests for approval from the National Science Foundation must be submitted electronically via the NSF FastLane System at <http://www.fastlane.nsf.gov>. Questions related to the electronic processing of these notifications and requests should be forwarded to the FastLane Help Desk by phone at: 1-800-673-6188 or by e-mail to: [fastlane@nsf.gov](mailto:fastlane@nsf.gov).

### Type of Grantee Notification

### AAG Citation

- 
- Grantee Approved No-Cost Extension
- Significant Changes in Methods/Procedures
- Significant Changes/Delays or Events of Unusual Interest
- Short-Term Absence of the PI/PD or co-PI/co-PD
- Amount of Federal funds is expected to exceed the grant by more than \$5,000 or 5%
- Cost Share \$500K or more
- Conflicts of Interest that cannot be satisfactorily managed, reduced or eliminated

I.D.3.c(i)

II.B.1.b

II.B.1.c

II.B.2.c

II.C.2.c

II.D.5

IV.A

<b>Type of Grantee Request</b>	<b>AAG</b>	<b>RTC</b>	<b>GC-1</b>	<b>Direct questions to:</b>
• First NSF Approved No-Cost Extension	<u>I.D.3.c(ii)(a)</u>	Art. 25	Art. 4	Program Office
• Second NSF Approved No-Cost Extension	<u>I.D.3.c(ii)(b)</u>	Art. 25	Art. 4	Grants Office
• Request for Supplemental Support	<u>I.E.4</u>			Program Office**
• Change in Objective or Scope	<u>II.B.1.a</u>	Art. 25	Art. 8	Program Office**
• Long-Term Absence of the PI/PD or co-PI/co-PD	<u>II.B.2.d</u>	Art. 25	Art. 8	Program Office**
• Change in Person-Months Devoted to Project	<u>II.B.2.e</u>	Art. 25	Art. 8	Grants Office, if necessary
• Withdrawal of PI/PD or co-PI/co-PD	<u>II.B.2.f</u>	Art. 25	Art. 8	Program Office
• Substitute PI/PD or co-PI/co-PD	<u>II.B.2.g</u>	Art. 25	Art. 8	Program Office
• PI/PD or co-PI/co-PD Transfer from One Organization to Another	<u>II.B.2.h</u>	Art. 25	Art. 8	Grants Office
• Contracting or Transferring the Project Effort (Subawards)	<u>II.B.3</u>	Art. 25	Art. 8	Grants Office
• Pre-award Costs in Excess of 90 Days	<u>V.A.2.b</u>	Art. 25	Art. 3	Grants Office
• Reallocation of Funds Budgeted for Participant or Trainee Support Costs	<u>V.B.8</u>	Art. 27	Art. 2	Program Office
• Rearrangements/Alterations in excess of \$25,000	<u>V.C.1</u>	Art. 27	Art. 11	Grants Office
• Adjustments to cost sharing commitments reflected on Line M of the approved NSF budget	<u>II.D</u>	Art. 23	Art. 22	Grants Office

**Notes:** \*This listing of Notifications and Requests for Approval is not intended to be all-inclusive. \*\*Final action by Grants Officer, when warranted. Small Grants for Exploratory Research Awards **are not eligible** for grantee-approved no-cost extensions.

Source: [http://www.nsf.gov/pubs/policydocs/pappguide/nsf09\\_1/aag\\_2ex1.pdf](http://www.nsf.gov/pubs/policydocs/pappguide/nsf09_1/aag_2ex1.pdf)

# Budget Issues

## Travel

- Expenses for transportation, lodging, subsistence and related items incurred by project personnel and outside consultants who are in travel status on business related to NSF-supported projects are allowable.

## Meals and Coffee Breaks

- When certain meals are an integral and necessary part of a conference, (e.g., working meals where business is transacted), grant funds may be used.
- Entertainment, amusement, diversion and social activities are unallowable costs.

# Budget Issues

## Participant Support Costs

- Costs of transportation, per diem, stipend and other related costs for participants or trainees (but not employees) in connection with NSF-sponsored conferences, meetings, symposia, training are allowable.
- Overhead exempt

# Potential NSF Oversight

- Programmatic Site Visits
- Division of Institution & Award Support (DIAS) contracted desk reviews
- DIAS Award Monitoring Business Assistance Program (AMBAP) site visits in conjunction with the Division of Grants Agreements (DGA)
- Division of Financial Management (DFM) contracted FFR (Federal Financial Reporting) reviews
- Office of Inspector General (OIG) audits



# Award Monitoring and Business Assistance Program (AMBAP)

- These are not audits but reviews
- Evaluate effectiveness of organization's management of NSF funds

## **Compliance & Common Areas of Concern**

- Time and Effort Reporting
- Participant Support
- Sub-awards/Sub-recipient Monitoring
- Consultants
- Program income
- Indirect Costs
- Records Retention
- Federal Accounting Requirements/Audits
- Written Policies

# Award Monitoring and Business Assistance Program (AMBAP)

## Risk Factors

- Award Amount
- New Grantee Status
- High \$ amount to subawards
- Government Owned Equipment
- Participant Support

## AMBAP Areas of Concern: Subawards

- Ability to perform (technically, financially and administratively)
- Adequate accounting system
- Not debarred from Federal grants or contracts
- Appropriate indirect cost rate and application base
- Cost or Price Analysis
- Plan in place for monitoring subawards
- Review of invoices
- Technical reviews or site visit reports

## AMBAP Areas of Concern: Participant Support Costs

- Costs tracked through the use of separate accounts, sub-accounts or sub-ledgers
- Actual expenditures compared to proposed costs
- NSF prior approval for reallocation
- Costs excluded from indirect costs

# Keys to Success

## Project/Award Specific Requirements

Read your award letter carefully! It may include:

- Funding restrictions
- Special reporting requirements
- Other special conditions

# Terms and Conditions – By Organization Type



- Research Terms & Conditions & NSF Agency Specific Requirements
  - US Academic Institutions of Higher Education
  - Other Non-profit organizations
  - Hospitals
- Grant General Conditions (GC-1)
  - For profit organizations (other than Small Business Innovation Research awardees)
  - State and local Governments

# Resources

- Administrative Requirements

Higher Education & Non-Profit	OMB A-110
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State & Local & Tribal Governments	OMB A-102
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For Profits	OMB A-110
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- Cost Principles

Higher Education	OMB A-21
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Non-Profit Organizations	OMB A-122
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State & Local & Tribal Governments	OMB A-87
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For Profits	FAR 31.2
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# Resources

## **Award & Administration Guide**

Consult the [Award & Administration Guide \(AAG\)](http://www.nsf.gov/pubs/policydocs/pappguide/nsf09_29/aag_index.jsp) formerly the Grant Policy Manual (GPM), for all your questions on NSF policy on awards.

[http://www.nsf.gov/pubs/policydocs/pappguide/nsf09\\_29/aag\\_index.jsp](http://www.nsf.gov/pubs/policydocs/pappguide/nsf09_29/aag_index.jsp)

The AAG is Part 2 of the [Proposal and Award Policies and Procedures Guide \(PAPP\)](#).

## **Research Terms & Conditions (RTC) 7/08**

<http://www.nsf.gov/bfa/dias/policy/rtc/index.jsp>

## **Research Terms and Conditions Prior Approval Matrix**

[http://www.nsf.gov/bfa/dias/policy/rtc/priorapproval\\_oct08.pdf](http://www.nsf.gov/bfa/dias/policy/rtc/priorapproval_oct08.pdf)

## **OMB Circulars**

<http://www.whitehouse.gov/OMB/circulars/index.html>

## **FastLane**

<https://www.fastlane.nsf.gov/fastlane.jsp>

Help Desk (800) 673-6188 or (703) 292-8143 or [fastlane@nsf.gov](mailto:fastlane@nsf.gov)

## **Financial Questions /Payment: 703-292-8280**

The Office of Budget, Finance & Administration (BFA) [www.nsf.gov/bfa](http://www.nsf.gov/bfa)



# Players & Communication Lines - Ask Early, Ask Often!!

- PIs communicate with their Sponsored Program Officers and the NSF Program Officers
- Sponsored Program Officers communicate with NSF Grants & Agreement Specialists
- Controller's Office/Finance staff communicate with NSF Grants Accountants in the Division of Financial Management
- Auditors, Cost Analysts communicate with NSF Cost Analysis & Audit Resolution Branch (CAARB)
- Lawyers communicate with NSF Office of General Counsel (OGC)

# Education and Human Resources Branch (EHR)

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Jason Madigan – Team Lead – 703-292-4333 - [jmadigan@nsf.gov](mailto:jmadigan@nsf.gov)

- Laura Buckley – Grant and Agreement Specialist – 703-292-4817 – [lbuckley@nsf.gov](mailto:lbuckley@nsf.gov)
  - DRL (Research on Learning in Formal and Informal Settings)
  - DUE CCLI Program only (Undergraduate Education, Course, Curriculum, and Laboratory Improvement)
- TBA – Grant and Agreement Specialist
  - HRD (Human Resource Development)
  - DUE (all Programs except CCLI)
- Angela Turner – Grant and Agreement Specialist – 703-292-1524 - [aturner@nsf.gov](mailto:aturner@nsf.gov)
  - DGE (Graduate Education)
  - OIA (Office of Integrative Activities)
  - EPSCoR – (Experimental Program to Stimulate Competitive Research)
- Regina Alexander-Pinkney – Grant Administrator – 703-292-8453 – [ralexand@nsf.gov](mailto:ralexand@nsf.gov)

# NSF Friendly Reminder

**ASK EARLY!**

**ASK OFTEN!**