



El Camino College

**Project Director's
Grant Preparation & Management
GUIDE**



2009-2010

PROJECT DIRECTOR'S Grant Preparation and Management Guide

Part I - Developing a Realistic Grant Budget

Faculty options for involvement in grant projects	3
Other things to consider when developing your grant budget	3

Part II - Congratulations! Your proposal has been funded!

1. Start-up Procedures	4
Start-up meeting	4
Board of trustees agenda items for staff	5
2. Managing Your Grant	5
a. Knowing the terms of your grant	5
b. Getting your staff paid	5
c. Purchasing	7
d. Travel	7
e. Monitoring your budget	8
- budget revisions: Granting agency procedures	
- budget revisions: ECC procedures	
f. Record keeping/What the auditors are looking for.....	9
g. Required Reports	9
h. Grant Completion Status Report.....	10
3. Close-out	10
a. Project Evaluation	10
b. Final Report	10
c. Disseminating project results	11

Part I – Developing a Realistic Grant Budget (helpful facts)

1. Faculty Options for Involvement in Grant Projects

Full-time faculty who want to be involved in grant-funded projects either as project directors or participants have two options.

Option 1=Release Time

To work on a grant, a faculty member can be released from a certain percentage (up to 100%) of his/her teaching load, e.g. one 4-unit course per semester, two 3-unit courses per semester, etc. Most grant funds will pay the cost of part-time instructors who replace the full-time faculty member working on the grant, and not the actual percentage of the full-time faculty's salary. If you are going to use this option, please check with your division office to determine what rate per unit they are currently using for part-time instructors. In 2008/2009 the highest rate for part time faculty lecture is \$1694 per unit, or \$94.11 hourly. You also need to add 10% of the total salary amount charged to the grant for benefits for each part-time employee. The release time option is only possible during fall and spring semesters. The actual salary for release time is paid from the division budget. However, for grants that are large enough to cover the actual cost of faculty release time budgeting the percentage of the faculty member's salary and benefits should be considered as an alternative.

Option 2 = Special Assignment

As a faculty member you can opt for working on a grant in addition to teaching your full load. In that case, estimate how many hours it will take to complete the grant activities for which you are responsible. There are no maximum hourly restrictions for Special Assignment. The hourly rate changes every January. The 2008 maximum rate is \$60.18 (Rate 1), \$45.14 (Rate 2), \$30.10 (Rate 3). During the summer, Special Assignment is the only option available.

Part-time faculty

Part-time faculty can work on a grant project and teach as long as they do not exceed 60% of FTE. For example, a part-time instructor teaching two 3-unit classes has a 40% load, which leaves 20% (8 hours a week for 18 weeks = 144 hours) for possible grant involvement. The hourly rate for part-time instructors' Special Assignment is the same as the rate used for full-time faculty, but 10% should be added in the budget to cover their benefits.

2. Other Things to Consider When Developing Your Grant Budget

When budgeting for larger purchases, don't forget to include the sales tax as well as the shipping and handling fees. Estimates are fine.

If you are planning to buy high tech or specialized equipment, you may need to consider budgeting funds for license fees (annual) and/or a maintenance contract.

Consider budgeting funds for:

- Printing if your dissemination plan includes sharing a lot of printed materials
- Meeting supplies (of various kinds, including food) if frequent meetings are a part of your plan
- Travel – if there are any meetings mandated by the grant.

Budgets for grants funded in past years are available in the Grants Office.

THE ROLE OF OFFICE OF GRANTS DEVELOPMENT AND MANAGEMENT

Beginning in March 2001, the former Grants Coordination Office was reorganized into the Office of Grants Development and Management. One of its roles now is to provide guidance, support and hands-on help to faculty and staff who manage grant-funded projects. This office is your one-stop service for all grant management-related issues. It will provide assistance with the following:

- Grant start-up
- Processing and tracking of all grant-related paperwork (hiring, payroll, purchasing, etc)
- Budget monitoring
- Report submissions
- Compliance audits
- Resolving any grant management issues that involve internal college operations
- Resolving any grant management issues that involve the funding agency (clarifications, changes, negotiations)

Generally, for anything that involves the management of your grant, contact the Office of Grants FIRST:

Bo Morton, Director of Grants: tel. 310-660-3235; e-mail bmorton@elcamino.edu or

Rudi Lopez, Administrative Assistant: tel. 310-660-3607; e-mail rlopez@elcamino.edu

1. Start-up Procedures

Immediately after you have been notified that your project has been funded, the Office of Grants will schedule a **start-up meeting** that will include you, the Project Director, your accounting technician + Bo Morton, Director of Grants. If there are any new full- or part-time positions in the grant, it will also include an appropriate representative from the Human Resources office. The purpose of the meeting is to set up your grant budget, initiate all the necessary forms for people who will be working on your grant, determine other needs you might have and establish reporting requirements.

Before the meeting:

- Estimate how you would like your budget to be set up according to the funded proposal.
- Make a list of reports required by the grant with their due dates.
- Make a list of all the people who will be involved in your grant. List their names (if known), time commitment to the grant, their pay rate, and a very brief description of their responsibilities.

Important: Assignments for each person working on your grant (including yourself) have to be approved by the Board of Trustees (BOT). The Office of Grants (in collaboration with your Division Office) will help you prepare BOT agenda items. The Board of Trustees meets monthly, usually on the third Monday. BOT agenda items have to be submitted at least two weeks in advance. It is important to get your personnel approved right away because **nobody will be paid unless the Board agenda items have been submitted to Human Resources and all appropriate forms for them have been processed.**

As a result of the meeting, you should have

- All the forms that need to be submitted for your grant personnel
- Budget account numbers so that you can start making expenditures authorized by the grant
- An Accounting Technician assigned to your grant
- Board Agenda Items needed for staff

2. Managing Your Grant

Now that you have the budget set up and your staff approved, you can start implementing your project. Information in this manual is intended to help you with the “administrative” aspects of your grant. For any additional information or assistance, please contact Bo Morton, Director of Grants (x 3235) or Rudi Lopez, Administrative Assistant (x 3607).

a. Knowing the Terms of Your Grant

One of the project director’s major responsibilities is to manage the project budget and activities within the terms of the grant. You should have in your possession a publication called “Grant Rules and Regulations” (or “Grant Terms and Conditions”). Read it VERY carefully and refer to it often. It describes what your grant allows and does not allow you to do. These rules constitute a legal contract between you (the Project Director) and the granting agency. It is important for you to know what they are.

b. Getting Your Staff Paid-Timesheets

It is your responsibility as Project Director to submit time sheets for every person working on your grant. Different time sheets are used for different categories of employees:

- For student workers – Timekeeper timesheet
- For Temporary Classified – Timekeeper timesheet
- For faculty on Special Assignment OR Stipend Assignment – Special Assignment timesheet
- Faculty on release time – none is necessary

*Please Note: Time and effort reporting has become of increased importance for federal compliance. Auditors are now requesting **time certifications**. For reference please see the attachment in the Appendix (p. 15).

Submitting Timesheets

If timesheets are submitted after the deadline, paychecks will not be issued until the next pay period. Before submitting them, please check all the information on the timesheets, including the account number and social security number to make sure it is correct.

Please submit all timesheets for grant-funded staff to Payroll by the following deadlines:

For Casual, Temporary Classified and student workers: by the 20th of each month; checks are mailed out on the 10th of each month.

For Certificated employees: by published cut off dates (see appendix). *Joyce will have her dates in 2 weeks from the county

Timekeeper

Starting July 1, 2001, part-time casual and student employee hours are tracked online by Employee Timekeeper. All casual and student employees are required to have a new photo ID with a Datatel number so that their hours can be tracked by timekeeper.

Contractual Services:

ECC Employee

Employees of the college performing additional duties or assignments for a stipend or a fixed fee must have that additional stipend submitted through the regular payroll process (not PSA). Complete a special assignment time sheet (see sample under Payroll) indicating the date, hours, and amount earned. Give a brief description of the service rendered and the Board date this assignment was approved. Submit this time sheet along with the special assignment and faculty hourly timesheets.

Non-Employees

Non-employees working as a contractor or consultant are paid using the PSA contract. The requisition is input in Datatel listing the payee as the vendor. (Refer to detailed information on PSA Contracts in the Purchasing section).

***Note: Please adhere to the guidelines and deadlines indicated in the Board Agenda Schedule (see attachments) for the approval of contracts through the office of the VP-SCA & Office of Purchasing. The VP-SCA office and Lillian Sapp will no longer be making exceptions.

c. Purchasing

Purchase requisitions for supplies, equipment, travel, etc. have to be entered through Datatel. You can either do it yourself or the Office of Grants will do it for you. If you want to do it yourself, you will need to:

- get *Datatel* software installed on your computer: call Information Technology Help Desk at extension 6571;
- get authorization to enter purchase requisitions: call Sheryl Kimball at extension 3264;
- get training on how to enter purchase requisitions or access your budget on line: call Linda Mobley at extension 3376.

For purchases of computer equipment and furniture please refer to the Purchasing Calendar for specific cut-off dates.

It usually takes from one to three weeks between the time your requisition is processed and the time you receive your order.

- If the cost of the item is between \$5,000 and \$74,000, the college is obligated to obtain competitive *quotations*. Contact buyer: Lois Hernandez, x3372 or request assistance from the Grants Office.
- If the cost of the item is over \$74,000, it requires a formal *bid*. Contact Rocky Bonura, x3374 or buyer listed above OR request assistance from the Grants Office.
- For questions regarding the purchase of computer equipment and furniture, contact Lois Hernandez, x3372.

d. Travel

If travel is part of your grant activities, fill out the Travel Request and Reimbursement (form#20455), follow standard district procedures for securing appropriate approvals prior to the trip. Make sure that your grant-related travel expenses are charged to the grant account. Travel requisitions are processed through Datatel like any other purchase requisitions (see section on Purchasing).

To receive mileage reimbursement, you have to complete the Safe Drivers Program at the Campus Police Department. The IRS has announced that its 2009 Standard Mileage Rate per mile is now 55 cents for business miles driven. Effective January 1, 2009. Please contact Grace Felarca, x6760 to schedule your Safe Drivers training.

Be aware that the District participates in the State of California, Department of General Services (DGS), and State Travel Management Program (STMP) for airfare, hotel and car rental at reduced rates. There is no Saturday night stay or 21 day advance purchase required. Tickets are cancelable and refundable.

*Please note: Following the guidelines specific to your grant regarding travel is essential, as different grants will allow and disallow costs for specific expenses (such as food). You will also need to detail the items included in travel expenses by category: airfare, hotel, conference fees, etc.

*Please note: District Travel – Change of Agency. In January 2009, the ECCD established a partnership with **Away We Go Travel, Inc.** for all district travel needs; including air, hotel and vehicle. Please read the attachment for travel instructions.

*Effective August 15, 2009, all travel reservations must include the **full name** of the passenger as it appears on their legal identification (i.e. driver's license or passport). Additionally, their **gender (male/female)** and **date of birth** must be provided. Please ensure that all involved in making travel reservations are informed. (see attachment)

e. **Monitoring your budget**

As Project Director, you must initiate or approve all direct charges to the project and check the status of your budget (expenditures) at least monthly. You can access it online through Datatel if you have Datatel software installed on your computer and/or you can go to the MyECC web portal and click on budget information and then click on budget selection. You can also receive printouts of grant expenditures from the Grants Office. It's your responsibility to check your budget for accuracy. If you think a mistake has been made, contact the Grants Office or the Accounting Technician assigned to your grant as soon as possible.

Keep in mind:

- Your financial report must agree with official college records.
- An Accounting Technician assigned to your grant can help you interpret your budget printout and answer questions about fiscal management, tracking expenditures, payroll procedures, etc. Arrange a workable schedule for the two of you to meet.
- The Grants Office will help you effectively manage the budget and adhere to the ECC fiscal procedures and schedule. Even if your grant fiscal year is different than the July 1 – June 30 ECC fiscal year, it is necessary to take into consideration ECC annual fiscal closing procedures when planning your expenditures.
- It is important that you spend all the funds you were awarded before the grant expires. Plan your expenditures early to avoid the last minute spending rush. Note the cut-off dates for externally-funded programs in the Purchasing Calendar attached. The Grants Office may contact you to make sure that grant funds are being spent in a timely manner.

Budget Revisions

If you need to make changes in the scope of your program and/or the grant budget, first discuss the changes with Director of Grants, Bo Morton (ext. 3235) to determine the procedure and the feasibility of the change. Requests for changes have to be submitted to and approved by the funding agency and ECC Accounting.

- Funding Agency Procedures

The grant contract (Grant Terms and Conditions) usually details procedures to follow for changes which modify either the scope, the objectives or the budget of an approved project. Using the forms or format required by the agency, you must formally write the requested changes. The Office of Grants will help you prepare and submit all necessary forms. No program changes can be made until official written approval is obtained. A copy of the approval letter has to be sent to the Grants Office.

- ECC Procedures

After the budget change has been approved by the funding agency, the Office of Grants will help you fill out the **ECCD Request for Budget/Expenditure Transfer form #20650** (see attachments). The completed form has to be approved by the Dean or Director, the area Vice President and the Business Manager. A copy of the funding agency approval letter should be attached. The approved transfer form will be sent to the Accounting staff person assigned to the grant.

f. Recordkeeping

Official audit records for grant expenditures are maintained by the Accounting Office. However, it is sound fiscal practice to maintain your own file of grant-related documentation. Copies of payroll records (timesheets), receipts, purchase orders, records of grant-funded travel can be helpful in reconciling your data with official files.

The following information is an excerpt from “Creating a Federal Grant “Audit Trail”” Sponsored by Thompson Publishing, 2008 which provides additional information about records and auditing:

Key types of records can be classified into three categories:

- Organizational
 - Governance, Policies and Procedures, Personnel
- Financial
 - Accounting Records, Tax Records, Fixed Assets
- Award-Related
 - Applications, Agreements and Modifications, Project Cost Accounting (Receipt & Expenditure Records)

What the auditors are looking for:

- Were the grant receipts properly applied?
- Were grant expenditures actually incurred?
- Did the expenditures benefit the grant?
- Were the expenditures eligible and allowable?
- Were records prepared accurately and timely and were they retained, as required?

g. Required Reports

Your grant contract (Terms and Conditions) usually includes a schedule for any reports that must be submitted and the dates these reports are due. At a minimum, most grants require a final narrative report and a fiscal report. For many grants mid-year progress reports are also required. Communicate these reporting requirements and the report due dates at the start-up meeting so that fiscal reports can be prepared on schedule. Your responsibility as Project Director is to prepare all required narrative reports. The accounting office will complete the required fiscal reports. The Grants Office will get all necessary signatures and mail the reports to the funding agency.

h. Grant Completion Status Report

Effective July 1, 2009, all project directors are required to fill out the “end of year grant status report” (see attachments) and submit it to the respective Vice President where the grant is housed. The report should outline the benefits of the grant to the institution. Dr. Fallo will be reviewing the reports.

2. Close-out Procedures

a. Project Evaluation

Your grant proposal should have included an evaluation plan, which spells out standards or criteria by which the project will be evaluated. This plan also explains the methods to be used in measuring the success of your project. It includes a description of what will be evaluated, when the evaluation will take place, instruments that will be used and how the information gathered will be used to determine the project’s success. Once you have completed the evaluation, you are ready to prepare the final report.

b. Final Report and Close-out Meeting

The final report is a requirement and funds are withheld by the agency until the report is filed. As with other grant reports, you prepare the narrative part and the Accounting Office prepares the fiscal report. The Grants Office can provide assistance with report preparation as well as securing all necessary signatures and mailing the report to the agency.

If your grant is over and is not being renewed:

Before submitting the final report, The Grants Office will schedule a close-out meeting with the Project Director and the Accounting Technician assigned to the project to review final expenditure data, resolve inconsistencies (if there are any) and close out (deactivate) all accounts to prevent their usage in the future.

c. Disseminating Project Results

Even though your grant is over, your tasks as Project Director may not be done. Dissemination of the results and products of the project may be one of your responsibilities. Many grant proposals include a dissemination plan. This plan is used to ensure that the required information is sent to appropriate professional organizations and publications; that presentations are made at meetings and conferences. Even if your proposal doesn't have a dissemination plan, the results of your grant should be publicized if they are significant or can be of interest to others in the field. Any publicity to the news media should be coordinated through the Public Information Office.

ATTACHMENTS:

1. Payroll	
a. Part-Time Faculty Salary Schedule (Appendix D-1).....	13
b. Special Rates of Pay for Faculty (Appendix D-3).....	14
c. Sample Timesheet (Special Assignment, Stipend).....	15
d. Time Certification (Office of Management Budget).....	16
2. Board Agenda Item	
Schedule	19
3. Purchasing Division	
a. 2009-2010 Purchasing Calendar.....	20
b. New PC and Equipment Procedure and Form.....	22
c. PC and Replacement Request Form and Procedure.....	23
4. District Forms: Sample Forms	
a. Mileage Reimbursement Form.....	26
b. Travel Reimbursement.....	27
c. Away We Go Travel Inc. (Instructions).....	28
d. Budget/Expenditure Transfer Form.....	31
e. ECC Staffing Requisition.....	32
f. Grant Completion Status Report.....	33
5. Personal Service Agreements: For PSA forms please contact the Grants Office for assistance.	

**EL CAMINO COMMUNITY COLLEGE DISTRICT
PART-TIME FACULTY SALARY SCHEDULE
Effective January 1, 2008**

LECTURE		Class I – BA		Class II - MA	
Step	Stipend	Hourly	Stipend	Hourly	
1	1327	73.73	1406	78.13	
2	1385	76.93	1464	81.33	
3	1442	80.13	1521	84.53	
4	1500	83.31	1579	87.72	
5	1557	86.51	1636	90.91	
6	1615	89.70	1694	94.11	

LAB		Class I – BA		Class II - MA	
Step	Stipend	Hourly	Stipend	Hourly	
1	1006	55.87	1066	59.20	
2	1049	58.29	1109	61.63	
3	1093	60.71	1153	64.05	
4	1136	63.13	1196	66.47	
5	1180	65.50	1240	68.88	
6	1223	67.97	1284	71.31	

ACTIVITY		Class I – BA		Class II - MA	
Step	Stipend	Hourly	Stipend	Hourly	
1	956	53.10	1013	56.28	
2	997	55.41	1054	58.58	
3	1039	57.71	1096	60.88	
4	1080	60.00	1137	63.18	
5	1122	62.31	1179	65.47	
6	1163	64.61	1220	67.78	

NON-INSTRUCTIONAL Class I – BA Class II - MA		
Step	Hourly	Hourly
1	41.72	44.22
2	43.53	46.03
3	45.34	47.83
4	47.15	49.64
5	48.96	51.44
6	50.76	53.26

APPENDIX D-3
SPECIAL RATES OF PAY FOR FACULTY
Effective January 1, 2008

RATE I **\$60.18**
Use for: Full-Time Faculty Substitute rate (Full-Time Faculty Substitute Rate for continuous substitute instruction/teaching in excess of two (2) weeks shall be at Rate I plus 15% of Rate I.).
Part-Time Faculty Substitute rate.
Overload rate (Instruction only).
Clinical Psychologists
Preparation for and conduct of instructional courses, workshops or seminars.
Instructional services assigned by the District on days not otherwise required as part of the Faculty Member's contract of service.
Consulting services of a technical/complex nature in which the Faculty Member coordinates or supervises the work of others, and/or has responsibility for oversight, reporting or accountability of a particular project or function.

RATE II **\$45.14**
Use for: Counselor, librarian, physician assistant, faculty coordinator, registered nurse and nurse practitioner duties, all of which involve student contact, in excess of 40 hours/per week during the academic year. See Article X, Section 13.
Substitute rate for counselors, librarians and nurses.
Assisting in the development of curriculum and conduct of research, if expressly approved in advance by the appropriate Vice President.
Administering or supervising assessment measures for students.
Conducting laboratory courses (e.g., computer laboratory, police and fire academy)
Certificated Tutors
Instructor of record for non-credit courses.

RATE III **\$30.10**
Use for: Special assignments not included in Rate I or II, such as student supervision (not as instructor of record).

Name Of Project
 Dates Worked (7/20/08-6/19/08)

Social Security #	Name	Dates worked	Total hrs	Hourly rate	Account #	BOT appr.
DETAIL						
Dates	Description		Hours			
	Completion of stipend or Special assignment: Details				TOTAL \$	\$0.00
Administrator's Signature (Project Director)						

**From Federal Office of Management and Budgets
Circular No. A-87, attachment B, 8 (h)**

For full reference please see:

http://www.whitehouse.gov/omb/circulars_a087_2004/#8

(h) Support of salaries and wages. These standards regarding time distribution are in addition to the standards for payroll documentation.

(1) Charges to Federal awards for salaries and wages, whether treated as direct or indirect costs, will be based on payrolls documented in accordance with generally accepted practice of the governmental unit and approved by a responsible official(s) of the governmental unit.

(2) No further documentation is required for the salaries and wages of employees who work in a single indirect cost activity.

(3) Where employees are expected to work solely on a single Federal award or cost objective, charges for their salaries and wages will be supported by periodic certifications that the employees worked solely on that program for the period covered by the certification. These certifications will be prepared at least semi annually and will be signed by the employee or supervisory official having first hand knowledge of the work performed by the employee.

(4) Where employees work on multiple activities or cost objectives, a distribution of their salaries or wages will be supported by personnel activity reports or equivalent documentation which meets the standards in subsection

(5) Unless a statistical sampling system (see subsection)

(6) Or other substitute system has been approved by the cognizant Federal agency. Such documentary support will be required where employees work on:

(a) More than one Federal award,

(b) A Federal award and a non Federal award,

(c) An indirect cost activity and a direct cost activity,

(d) Two or more indirect activities which are allocated using different allocation bases, or

(e) An unallowable activity and a direct or indirect cost activity.

(5) Personnel activity reports or equivalent documentation must meet the following standards:

(a) They must reflect an after the fact distribution of the actual activity of each employee,

(b) They must account for the total activity for which each employee is compensated,

(c) They must be prepared at least monthly and must coincide with one or more pay periods, and

(d) They must be signed by the employee.

(e) Budget estimates or other distribution percentages determined before the services are performed do not qualify as support for charges to Federal awards but may be used for interim accounting purposes, provided that:

(i) The governmental unit's system for establishing the estimates produces reasonable approximations of the activity actually performed;

(ii) At least quarterly, comparisons of actual costs to budgeted distributions based on the monthly activity reports are made. Costs charged to Federal awards to reflect adjustments made as a result of the activity actually performed may be recorded annually if the quarterly comparisons show the differences between budgeted and actual costs are less than ten percent; and

(iii) The budget estimates or other distribution percentages are revised at least quarterly, if necessary, to reflect changed circumstances.

(6) Substitute systems for allocating salaries and wages to Federal awards may be used in place of activity reports. These systems are subject to approval if required by the cognizant agency. Such systems may include, but are not limited to, random moment sampling, case counts, or other quantifiable measures of employee effort.

(a) Substitute systems which use sampling methods (primarily for Temporary Assistance to Needy Families (TANF), Medicaid, and other public assistance programs) must meet acceptable statistical sampling standards including:

(i) The sampling universe must include all of the employees whose salaries and wages are to be allocated based on sample results except as provided in subsection (c);

(ii) The entire time period involved must be covered by the sample; and

(iii) The results must be statistically valid and applied to the period being sampled.

(b) Allocating charges for the sampled employees' supervisors, clerical and support staffs, based on the results of the sampled employees, will be acceptable.

(c) Less than full compliance with the statistical sampling standards noted in subsection (a) may be accepted by the cognizant agency if it concludes that the amounts to be allocated to Federal awards will be minimal, or if it concludes that the system proposed

by the governmental unit will result in lower costs to Federal awards than a system which complies with the standards.

(7) Salaries and wages of employees used in meeting cost sharing or matching requirements of Federal awards must be supported in the same manner as those claimed as allowable costs under Federal awards.

**Board Agenda Schedule through November 09
(Subject to Change, Contact the Grants Office)**

Contracts & PSAs Due to Vice President Student Services	Contracts & PSAs Due to Purchasing	Personnel Items Due to Vice President Student Services	Board Meeting Date (4:00 pm)
September 24, 2009	September 28, 2009	September 30, 2009	October 19, 2009
October 22, 2009	October 26, 2009	October 28, 2009	November 16, 2009
November 25, 2009	November 30, 2009	December 2, 2009	December 21, 2009



Business Services Division

E-mail Memorandum

2009-10 PURCHASING CALENDAR

Date: June 1, 2009

To: Administrators & Supervisors

From: Rocky Bonura, Director of Business Services

The Purchasing Calendar has been developed to give you direction in scheduling the on-line submission of various types of requisitions for various types of funds and projects. Strict adherence to the calendar will ensure on-time delivery of materials and services. Unnecessary delays to instructional programs and emergencies for all needs can be avoided with advance planning, and allow the Accounts Payable unit to meet invoice processing deadlines, as well as pay vendors in a timely manner.

All supply, equipment and service needs must be transmitted to Purchasing via the Colleague (Datatel) on-line requisition process.

REMINDERS

- 1) Requests for PCs and replacement PCs (including hardware, software, printers, servers, peripherals, etc.) are still to be placed through the Information Technology Services Division. Forms are available on the PORTAL homepage by clicking on **FORMS** then on **VIEW/PRINT FORMS**.

- 2) If you are ordering equipment or furniture which needs to be newly installed or swapped out for replacement or which requires room renovation/remodeling/(re)wiring, an **ADD/MOVE/CHANGE SERVICE REQUEST** must be completed and signed off by your area Vice President before any action will take place. (See Management Procedure 519, accessible through PORTAL. Click on **DOCUMENTS**, then on **ADMINISTRATIVE PROCEDURES**. Download Procedure 519 and duplicate form as needed.) Your account number is also needed to cover the related expenses of those changes.

2009-10 PURCHASING CALENDAR

Date On-Line Requisitions Due in Purchasing	Responsible Administrator(s)	Commodity/ Service
July 31, 2009	All Administrators and Supervisors	Req'ns for Fall '09 furniture (classroom or office) needs
August 14, 2009	All Administrators and Supervisors	Req'ns for Fall '09 instructional & office supplies
October 23, 2009	All Administrators and Supervisors	Req'ns for Spring '09 furniture (classroom & office) needs
April 1, 2010	All Administrators and Supervisors	<p>CUT-OFF DATE for all supply and equipment req'ns for ALL FUNDS, charged to 2009-10 budgets.</p> <p>Note: Req'ns for <i>services</i> may continue to the end of June' 10.</p>
May 14, 2010	All Administrators and Supervisors	<p>CUT-OFF DATE for buying merchandise on all other 2009-10 Blanket POs. Turn in invoices to Accounts Payable as expenses are made.</p>
May 28, 2010	All Divisions	<p>CUT-OFF DATE for buying 2009-10 office supplies through Office Max/Boise on-line system</p>
June 11, 2010	All Administrators and Supervisors	Instructional supply req'ns for Fall '10 semester (and charged to 2009-10 budget)
June 30, 2010	All Divisions	Last day to receive merchandise or services for the 2009-10 fiscal year
June 30, 2010	All Divisions	Last day to turn in invoices and packing lists to Accounts Payable for payment of 2009-10 expenses
July 2010	All Administrators and Supervisors	<p>FY 2010-11 – Please wait until you receive notice from Purchasing when to begin processing requisitions for all services beginning July 1st.</p>



July 11, 2001

PROCEDURE FOR ORDERING
New PCs/Computers (and related) Equipment
Replacement/Upgrade PCs/Computers (and related) Equipment

Developed by Purchasing and Information Technology Services Divisions

Effectively immediately, the quarterly computer purchase/replacement program has been eliminated and replaced with the following year-round ordering procedure:

Instructional Computers (those designated for use by students) will normally be replaced on a 3-year rotating cycle and processed through the Division of Information Technology Services. No requisitions, regardless of funding source, are to be submitted for any instructional computers. Submit a completed **New PC Request Form** or a **PC Upgrade/Replacement Request Form** to Information Technology Services.

Administrative Computers (all PCs except those used by students) will be newly purchased or replaced/upgraded on an as-needed, justified basis. Those desiring either purchase must complete a **New PC Request Form** or a **PC Upgrade/ Replacement Request Form**. Submit complete forms to Information Technology Services whenever a need has been identified.

Both forms are available on the Infonet homepage by clicking on the **FORMS** button, then on the **VIEW/PRINT FORMS** tab. Print forms as needed.

Please note that there are now unique object codes which must be used for computer purchase or replacement/upgrade funding.

For New PCs, use: -56411- for Instructional equip. OR -56421- for Non-Instructional equip.

For Replace/Upgrade PCs, use: -56416- for Instructional equip. OR -56426- for Non-Instructional equip.

Information Technology Services will create and submit a requisition(s) on your behalf, following approval of your request. You may be contacted by ITS for additional information.

Requisitions will still be accepted year round (up to the April 1, 2002 cut-off date for **all** funds) for software purchases, upgrades, software site licenses, peripheral computer supplies (surge suppressors, non-glare screens, cords, etc.)

Contact Janet Clarke, Purchasing Division, Ext. 3374 or Alex Kelley, Information Technology Services Division, ext. 3260 for additional information or assistance.

NEW PC REQUEST FORM

Requesting Division _____ Date _____

New equipment being requested:

Qty	Item (PC, scanner, printer, server, etc.)	Suggested Manufacturer/Model	Est. Total Item Cost
ea			

(Attach additional sheet for more new equipment)...

Justification:

Funding source: P4E VTEA Block Grant CalWORKS Other: _____

New equipment – Instructional Account # _____ - 56411- _____ - _____

New equipment – Non-Instructional Account # _____ - 56421- _____ - _____

Date _____ Administrator's signature _____

OFFICE USE ONLY:

Req'n Account No.: _____

New equipment cost : \$ _____

Other costs: \$ _____

Description of additional costs: _____

Information Technology Services Approval

Division standardization

Date _____

Comments _____

PC UPGRADE/REPLACEMENT REQUEST FORM

Requesting Division _____ Date _____

Equipment to be replaced/upgraded:

Item (PC, printer, server, etc.)	Manufacturer	Serial #	ECC Tag #	Approx. Age

(Attach additional sheet for more replacements/upgrades)...

Reason for replacement/upgrade:

- Job functions require upgraded or replaced PC
- Frequency of repair/Always in the shop
- PC can no longer support software required
- Recommended by Information Technology Services
- Computer equipment purchased with restricted categorical funds will be replaced through the Request process
- Other: _____
Justification: _____

Funding source: P4E VTEA Block Grant CalWORKS Other: _____

Replace/upgrade equipment – Instructional..... Account # _____ - 56416- _____ - _____

Replace/upgrade equipment – Non-Instructional Account # _____ - 56426- _____ - _____

Date _____ Administrator's signature _____

OFFICE USE ONLY:

Req'n Account No.: _____

Description of additional costs:

Division standardization

Recycle from existing inventory

Comments _____

Replacement/upgrade cost : \$ _____

Other costs: \$ _____

Information Technology Services Approval

Date _____

EL CAMINO COMMUNITY COLLEGE DISTRICT

MILEAGE REIMBURSEMENT

Per Board Policies 3533 and 3540

Name _____ Month _____, 20_____

DATE	FROM	TO	PURPOSE	MILES	PARKING

I hereby certify that this is a true and correct statement of mileage and parking fees necessary in the performance of my duties.

Signature

Division _____ Department _____

Approval of Dean/Director
(Signature confirms that employee is an approved driver in compliance with Board Policy 3540.)

Approval of Department Vice President

Total Miles _____ at _____ cents per
mile = _____
+ parking (attach receipts) _____

TOTAL DUE _____

Budget Account Code

FOR ACCOUNTING USE ONLY

Budget Verification _____ Date _____

SUBMIT IN TRIPLICATE TO YOUR DIVISION DEAN/DIRECTOR

El Camino College

Travel Request and Reimbursement

Name (Please Print or Type) _____

Division/Department _____

Name of Conference (attach brochure) _____

City _____ State _____

Inclusive Dates _____

Purpose of meeting _____

Method of Travel: Air (commercial) Air (personal) Train or Bus Other _____
 District vehicle Rental car Personal car

Substitute Needed Yes No Number of hours paid certificate sub _____

Loss in Salary Yes No Mileage and expenses not to exceed: \$ _____

Account	Amount	Administrator(s) Signature of Approval	Date

This section to be completed and signed by area Vice President (Signature not required for travel requests under \$1,000 and in State)

Area Vice President signature _____ Date _____

The above request was approved on (date) _____ by the Superintendent/President in accordance with ECC Board Policy 4332 or Board of Trustees, if applicable.

CLAIM

(This section to be completed by requestor after conference.)

ITEM	SUN	MON	TUES	WED	THUR	FRI	SAT
NO RECEIPTS: Breakfast							
Lunch							
Dinner							
Taxi, Bus, Airport Shuttle, Parking							
Telephone/Fax							
Transportation by personal car or aircraft: Total number of miles _____ @ _____ cents/mile. Amount cannot exceed economy airfare.							
RECEIPTS: Lodging							
Registration							
Commercial Transportation							
Auto Rental							
Other (Itemize)							
DAILY EXPENSE TOTALS:							

Less prepayments by College:

Cash advance: \$ _____ Air Transportation \$ _____ (PO# _____) Total expense: \$ _____

Registration: \$ _____ (PO# _____) Lodging: \$ _____ (PO# _____) Total prepayments: \$ -

Other: \$ _____ Net due employee \$ _____

Requestor's Signature _____

Date: _____

Approval of Administrator _____ Date _____

Account Number	Amount *	Accounting Office Verification

* May not exceed "Mileage and expenses not to exceed \$ _____", amount above.



El Camino College - Away We Go Travel

Desk Level Instruction for Travel Arrangements

DLI-ELC
Dec 2008

Introduction

El Camino Community College District is now positioned to participate in the State of California, Department of General Services (DGS), State Travel Management Program (STMP). In addition to all normally published fares publically available, special YCAL (last seat availability) and VCAL (limited additionally discounted fares) contracted by the state are now available. All state contracted air fares are fully refundable and changeable without penalty. This travel program includes air, hotel and vehicle accommodations.

Purpose

The purpose of this document is to provide an overview of the needs, expectations and procedures required to maximize cost and time savings using effective communication in a timely and accurate manner.

Procedure

For Telephone or E-mail Reservations:

Contact Away We Go Travel by phone, (562) 596-5501, or email, awaywego.travel@verizon.net to request an air quote. State rates will be actual, non-state rates will be *estimates* as non-state rates are subject to change until ticketed. Some carriers require instant ticketing while all others require ticketing by 10pm the next day, Saturdays and Sundays *included*.

Upon receipt of the quote, complete an on-line Datatel requisition.

Review the e-mail reservation request that is returned to you by Away We Go Travel.

Respond via e-mail with the authorized requisition number to issue the ticket.

Upon receipt, review for accuracy, within 24 hours, the reservation/invoice issued. The invoice will be forwarded to Accounts Payable by Away We Go Travel.

For On-Line Web Reservations:

Access awaywego-travel.com and complete the Reservation Request Form. Note: In the "Accounting" box, type in "request for quote". Upon receipt of the quote, complete an on-line Datatel requisition.

Review the e-mail reservation request that is returned to you by Away We Go Travel.

Respond via e-mail with the authorized requisition number to issue the ticket.

For On-Line Web Reservations (Con't):

Upon receipt, review for accuracy, within 24 hours, the reservation/invoice issued. The invoice will be forwarded to Accounts Payable by Away We Go Travel.

IMPORTANT: Responses will be provided by Away We Go Travel to the person who is entered in the e-mail address. It is recommended that the requisitioner be the response person to avoid confusion.

Secure Flight and You



Beginning in mid-2009, the Transportation Security Administration (TSA) will require you to provide your:

**full name,
date of birth and
gender**

as it is shown on the identification document that you plan to present at airport security check-points. This information is not optional and should be presented at the time of booking.

The purpose of collecting this information is to allow TSA to perform terrorist watch list matching that is currently being done by each airline. Failure to provide the required elements in advance could inhibit your ability to get a boarding pass either at home or at the airport until the information has been provided.

If you have a name similar to, or the same as, a name on the current terrorist watch list, and have experienced secondary screening at airports, you will have the option of providing your Redress Number at the time of booking to prevent secondary security screening. A Redress Number is a unique number that helps TSA eliminate watch list misidentification. If you encounter watch list misidentifications, you can go to DHSTrip.gov to apply for a Redress Number.

Tips

- Contact your travel agent to update your profile with your full name, date of birth and gender. Also provide your Redress Number if you have one.
- While not all reservation systems have been programmed yet to accept all Secure Flight data elements such as date

of birth, gender and Redress Number, you should begin making reservations using your full name and, when applicable, provide your date of birth and gender. All data elements should match exactly the ID you plan to present at the airport. For example, if your state-issued drivers license lists your name as Anthony Q Public, then your reservation must be booked as Anthony Q Public, not Tony Q Public or A. Quinn Public. If your full middle name is on the ID, you must include your full middle name in the reservation.

- Verify your name on your frequent traveler profiles. If you signed up for frequent traveler programs using a nick name or a name other than your name as shown on your identification, you should contact each frequent traveler program to update your name to match Secure Flight's full name requirement. For example, frequent traveler program participant Tony Q Public should update his frequent flyer profiles to Anthony Q Public so that he does not jeopardize receiving credit when traveling under his full name as required by Secure Flight.
- If you use your state-issued ID card for some trips and your passport for other trips, check to see if the names match exactly, as passports often include full middle names and a state issued ID cards may only include a middle initial. If the names do not match exactly, for each trip you must remember to use the name format of the identifying document that you plan to use.
- Be sure to bring your valid government-issued documentation when flying.

Visit TSA.gov for updates on Secure Flight



© American Society of Travel Agents 2/27/2009



**STAFFING REQUISITION
CLASSIFIED AND
SUBSTITUTE/SHORT TERM PERSONNEL**

Position Title	
Position Control No.	Date Needed
Division	Department

INSTRUCTIONS: Complete and after appropriate approvals, forward both copies to the Personnel Division

REASON FOR REQUEST	<input type="checkbox"/> Replacement (for whom) _____ (Reason) _____
	<input type="checkbox"/> Addition (attach justification) <input type="checkbox"/> New Proposed Title _____
	<input type="checkbox"/> New position (attach justification and detailed description of proposed duties and qualifications)

ASSIGNMENT	<input type="checkbox"/> Regular Classified	% Assignment	<input type="checkbox"/> 10 Months	<input type="checkbox"/> 11 Months	<input type="checkbox"/> 12 Months
	<input type="checkbox"/> Restricted Classified	Approximate Length of Assignment			
	<input type="checkbox"/> Non-Certified Temporary				
	<input type="checkbox"/> Substitute <input type="checkbox"/> Short Term				
	<input type="checkbox"/> Funded Program	Title			
		Program No.			
		Funded through			

QUALIFICATIONS	<input type="checkbox"/> As stated in Position Description	<input type="checkbox"/> Additional Desirable Qualifications (List) _____
-----------------------	--	--

WORK SCHEDULE	Work Hours Per Day	Total Work Hours Per Week	Days (Circle)
	From _____ <input type="checkbox"/> a.m. <input type="checkbox"/> p.m.	To _____ <input type="checkbox"/> a.m. <input type="checkbox"/> p.m.	S M T W T F S
	From _____ <input type="checkbox"/> a.m. <input type="checkbox"/> p.m.	To _____ <input type="checkbox"/> a.m. <input type="checkbox"/> p.m.	S M T W T F S
	From _____ <input type="checkbox"/> a.m. <input type="checkbox"/> p.m.	To _____ <input type="checkbox"/> a.m. <input type="checkbox"/> p.m.	S M T W T F S
	Meal Period <input type="checkbox"/> 30 minutes <input type="checkbox"/> 45 minutes <input type="checkbox"/> 1 hour <input type="checkbox"/> Other (Specify)		

SALARY	Salary Range	<input type="checkbox"/> Monthly	Shift Assignment <input type="checkbox"/> Swing <input type="checkbox"/> Night
	Starting Salary	<input type="checkbox"/> Hourly	<input type="checkbox"/> Split

Approved by _____ (Date) _____ (Date)
Dean/Director/Manager (Date) Vice President (Date)

To be completed by Personnel Division

POSITION ANNOUNCEMENT	Issue Date	Closing Date
	<input type="checkbox"/> On Campus Distribution	
	<input type="checkbox"/> Affirmative Action Recruiting List	
	<input type="checkbox"/> Other (List) _____	

RECRUITING FOLDER	Date Prepared	Date Closed
--------------------------	---------------	-------------

NEWSPAPER ADVERTISEMENT	Name of Paper	Name of Paper
	Date(s)	Date(s)
	Cost	Cost

ADDITIONAL RECRUITING ACTION	<input type="checkbox"/> Listed with EDD on _____ by _____
	<input type="checkbox"/> Other (List) _____

RECRUITING SUMMARY	Number of Total Applicants	Men	Women
	Black American Indian	Asian	Hispanic Other

PLACEMENT	Filled By	EEO Code	Effective Date
	<input type="checkbox"/> New Hire <input type="checkbox"/> Rehire <input type="checkbox"/> Reemployment <input type="checkbox"/> Promotion <input type="checkbox"/> Transfer		

PERSONNEL OFFICE DISTRIBUTION Original-Division Manager
Yellow-Personnel Division

