



**Commonwealth of Massachusetts**  
**Executive Office of Public Safety and Security**  
**Office of Grants and Research**

**2025 Emerging Adult Reentry Initiative (EARI) Grant**  
**Technical Assistance Training Session**  
**EARI Reporting Requirements and Guidance**

March 26, 2025

*Victoria Gouveia, Program Manager*



*Office of Grants and Research  
Justice and Prevention Division*

## Agenda

- **Introductions**
- **Grant Overview**
- **Reporting Schedule**
- **Quarterly Financial Reporting**
- **Grant Award Modification (GAM) Guidelines**
- **Quarterly Revisions**
- **Questions**



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## Grant Overview

- ❑ 6 EARI recipients awarded \$5,950,000.00
  - ❑ Action for Boston Community Development, Inc.; Legendary Legacies, Inc.; Roca, Inc.; The Mission Inc.; Uncornered, Inc.; UTEC
- ❑ 1 Technical Assistance Provider awarded \$525,000.00
  - ❑ UTEC - Training Center for Excellence
- ❑ Grant Project Period : **Start Date - 12/31/25** (*The start date is the date your Standard Contract Form was signed by our Executive Director, Kevin Stanton.*)
- ❑ All expenses must be obligated between these dates.



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## **Reporting Schedule**

All awardees are required to submit a quarterly report by the due dates listed below.

<b>Reporting Period</b>	<b>Due Date</b>
Quarter 1: Contract start date - March 31, 2025	April 15, 2025
Quarter 2: April 1 - June 30, 2025	July 15, 2025
Quarter 3: July 1- September 30, 2025	October 15, 2025
Quarter 4: October 1 - December 31, 2025	January 15, 2026

In addition to the quarterly financial/programmatic reports, all awardees will have to complete a data collection report for the technical assistance provider as well.



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## **OGR Quarterly Reporting Forms**

### SFY2025 Emerging Adults Reentry Initiative Progress Report

- ☐ SFY2025 EARI Quarterly Reports are to be submitted via the online report (link above)
- ☐ Each quarterly report includes:
  - Programmatic Section
  - Financial Reporting Section: which requires uploading your completed and signed Excel Financial Expenditure workbook and supporting documentation.
    - Please note that invoices must match the line item. If you are requesting a partial amount from an invoice, please note on the invoice and in the description line in the expenditure workbook.
- ☐ Your agency's Excel Financial Expenditure Workbook, which will reflect your approved budget will be emailed to you within the next week.



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## Quarterly Reporting Form Process

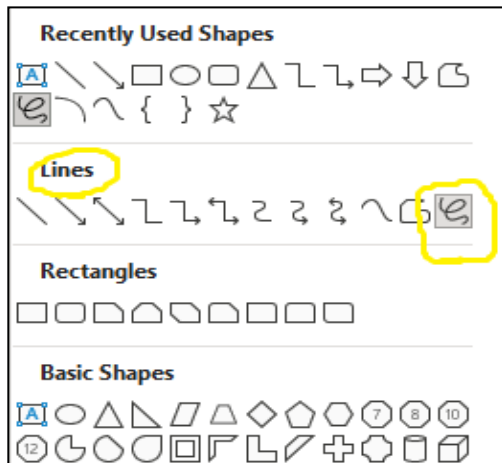
- 1) Receive link and Excel Financial Reporting Workbook via email from OGR
  - 2) Open Excel workbook, input expenditures for that quarter. Scan and save backup documentation (invoices, receipts, etc.)
  - 3) Sign Excel Workbook Budget Summary tab and save Excel workbook
  - 4) Open the [EARI Online Reporting Form](#)
  - 5) Complete all questions in report
  - 6) Upload the signed financial report in Excel format.
  - 7) Upload supporting documents (invoices, receipts, etc.)
  - 8) Digitally sign reporting form and submit
- You will be signing in 2 places - the financial Excel workbook and the online form**




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## Electronically Signing Excel Workbook

- ☐ At the top of Excel, click Insert, Shapes (In Illustrations).
- ☐ In the dropdown selection, choose the Freeform: Scribble option.
- ☐ After clicking this option, the user's mouse cursor will turn from an arrow to a pencil. The subrecipient is now able to sign the **Budget Summary** page
- ☐ To complete a signature, the user will need to hold down the mouse button for the duration of the signature. Any break in the signature will cause the user to repeat the actions to complete the signature.



Total Costs	\$	-
Completed by		
Signature:		
Date:	February 23, 2023	
Print Name:	Steven Domings	
Email Address:	steve.m.domings@mass.gov	
certify that this report, schedules, statements, and the expenses for which payment is requested are true, correct, and complete and were made in accordance with the appropriate Federal and State regulations and that the articles or services listed were		



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# Financial Reporting Guidance

When completing the financial portion of the reporting forms, be sure to only include **approved** expenditures from OGR approved budget. Your agency's approved budget will already be entered into the form.

## Supporting documentation to be kept on file/not uploaded to form

- ☐ **Personnel, Fringe, Indirect Costs:** Keep all invoices, receipts, and payroll records at your site. Awardees do not need to submit these with the reports, but the award recipient is responsible for retaining them.

## Supporting documentation required to be uploaded to reporting form

- ☐ **Contracts/Consultants:** Submit invoice(s) for ALL subcontractor/consultant costs incurred each quarter.
- ☐ **Travel:** Submit receipts and/or mileage reimbursement forms. Mileage reimbursement rate cannot exceed \$0.62 per mile.
- ☐ **Gift Cards, Transportation, etc:** Invoices and receipts will need to be submitted for all purchases. In addition, you will be asked for your Gift Card Policies and Procedures in the reporting form.

## Supporting documentation may be required to be uploaded

- ☐ **Equipment/Supplies/Administrative Costs** Keep all documentation and copies of receipts and/or invoices on site for inspection during site visits. However, invoices from cumulative purchases from any single vendor equal to/over \$1,000 will need to be submitted and uploaded to the quarterly reporting form.

For site visit purposes, please organize and save expenditure backup in quarterly folders, separated by cost category (digital backup is preferred).





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## Quarterly Report Revisions

Each quarter, your report goes through a multi-step review process. During that review process, you may receive a request to revise your quarterly report.

Some common types of revisions:

- × Unallowable costs
- × Costs that are allowable per the AGF but not per your approved budget
- × Missing or incorrect invoice

You will receive an email regarding the requested revisions and a link to your completed online report. At this point, the form will be re-opened and any adjustments can be made.

\* You will need to reupload the revised expenditure report to the [EARI Online Reporting Form](#) and adjust any information that was changed due to the revisions

If any changes need to be made to a previous quarter, those changes should be shown in the current quarter's expenditures.



## Grant Award Modifications (GAMs)

Quarterly Cash Expenditures

Cost Categories	Approved Budget	Quarter 1	Quarter 2	Quarter 3	YTD Cash Expenditures	Balance
Contract Costs		\$ -	\$ -	\$ -	\$ -	\$ -
Equipment Costs	\$ 40,000.00	\$ 30,000.00	\$ 10,010.00	\$ -	\$ 40,010.00	\$ (10.00)
Supplies Costs	\$ 20,000.00	\$ 15,000.00	\$ 2,500.00	\$ -	\$ 17,500.00	\$ 2,500.00
Other Costs		\$ -	\$ -	\$ -	\$ -	\$ -
TOTALS:		\$ 45,000.00	\$ 12,510.00	\$ -	\$ 57,510.00	\$ 2,490.00

- ▶ **ANY AMOUNT** exceeding an approved cost category's allocation as reflected in your approved budget, will require the awardee to complete the GAM form and submit to your OGR program coordinator for approval **prior** to spending.
- ▶ A GAM will be needed for any spending in a cost category that has not previously been approved.
- ▶ The GAM should be submitted **PRIOR** to utilizing the funds.
- ▶ It is **strongly** encouraged that no more than three (3) GAMs occur during a given performance period. Additional requests may or may not be approved.
- ▶ All GAM requests must be submitted to OGR at least 30 days prior to the end of the project period.
- ▶ GAMs must be reviewed and approved by the OGR program coordinator and division manager prior to the proposed spending change.

The only exception may be the final quarterly report of the project period. Your grant manager has the discretion to approve spending up to \$1,000 exceeding each cost category in the final report without a GAM if needed.

# Emerging Adult Reentry Initiative (EARI) Technical Assistance Provider

- ▶ UTEC's Training Center for Excellence
  - ▶ To provide administrative support and training to grantees, including program design, technical assistance and program evaluation.
- ▶ Biannual Reporting
  - ▶ Data will be collected during Q2 (July 15th) and Q4 (January 15th)



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# **OGR Contact Information & Questions**

**SFY25 EARI Resources Page**

[Emerging Adult Reentry Initiative \(EARI\) | Mass.gov](#)

*We look forward to scheduling site visits with all of you to observe the wonderful work this grant is funding.*

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