Grants Policies, Procedures & Required Forms

Jodi Hammond-Axberg, Grants Manager
Medaille College
716-880-2346; jph344@Medaille.edu
December 16, 2019
Meeting Agenda

1. Brief Introduction
   Mary Todd, Jeff Faunce, Stephen Kozak, Jodi Hammond-Axberg

2. Grants Manager
   - Overview
   - Policies & Procedures
   - Responsibilities Outline
   - Time & Effort Forms**

3. Finance Department Items
   - Chart of Accounts/Budget Lines
   - Budget Transfer vs Reclassification
   - Check Cashing & Credit Card Use Policies
   - Forms (Check Request, Tax Exempt, Credit Card Use)
   - Web*Finance
   - Excel Knowledge

4. Final Thoughts
   Q&A
Overview – What’s in the Folder?

- Policies & Procedures
- Responsibilities Outline
- Administrative Routing Form
- Grant Report Processing Form
- Labor Redistribution Form
- Time & Effort Certification Report
- Check Processing Policy
- Credit Card Use Policy
- Tax Exempt Form
Grants Manager

- **Grants manager**
  - The Grants Manager will assist Project Directors/Investigators in the review of reports process, by answering questions, or by finding appropriate additional resources that may be needed when necessary for report completion.
  - Note: the Grants Manager is not responsible for collecting data or drafting any report needed for the grant agency or the College.
  - The Grants Manager must be informed whether the Project Director/Principal Investigator (and any other faculty/staff on the grant) will be receiving any stipend or course release for the grant work.
  - The Grants Manager should be informed of any travel that is required for the grant.
  - Any problem or issue that a Project Director/Principal Investigator is having with their grant should be reported to the Grants Manager as soon as possible so that solutions can be found cooperatively. It is important to note that the Grants Manager is the first point of contact when any problems or issues arise that involve the College. The Grants Manager will contact the Vice President of Academic Affairs if needed.
  - The Grants Manager will maintain all Time & Effort records.

- Liaison with Grant Writers
- Coordinates Grant Applications
- Files/Submits Grant Applications
- Submission of institutional grant reports
- Creates & Maintains Systems
- Manage timelines & deliverables
- Attend Grant Training Workshops
- Track Grant Opportunities
Research, Grants & Assessment at Medaille College

Medaille College Mission Statement

Mission
The mission of Medaille College is to educate and develop empowered individuals for academic achievement, career success and civic engagement, thereby contributing to a healthy, diverse democracy.

Vision
Medaille College will be known as a leader in providing inspiration and opportunity for students, faculty, staff, alumni and community by supporting academic development, positive personal transformation and a strong sense of civic-mindedness.

Research and Scholarship Statement at Medaille College
Scholarship is an intrinsic element of academic life of the College. To acknowledge that Scholarly productivity is an essential component of a faculty member’s duties is to ensure that teaching, which lies at the heart of the College’s responsibility to its students, is able to impart the intellectual richness that typically characterizes a community of scholars. The specific form and intensity of appropriate scholarly activity within the College will vary among faculty because of rank (e.g., tenure track vs. professor of the practice) and discipline.

The role of the Research, Grants & Assessment (f/k/a Institutional Research) Office includes institutional data. However, IR does not provide grant specific data unless special requests are made.

IR will help train individuals so they can maintain reporting.
Research, Grants & Assessment at Medaille College

Pre-Award Responsibilities

- Notify the Grants Manager of your interest
- Complete Pre-Proposal Approval and obtain necessary signatures
- Conduct IRB if necessary
  - Comply with FERPA
- Proposal & Budget Preparation (in collaboration with Grants Manager, CASTLE, Finance Dept. and Grant Consultant, if applicable)
- Obtain final approval from Provost and CFO (Final Administrative Routing Form)

What is the Medaille College IRB?

The Medaille College Institutional Review Board (IRB) is a committee designated to review, to approve the initiation of, and to conduct periodic review of research involving human participants (sometimes referred to as human subjects). The primary purpose of such review is to ensure that necessary steps are taken to protect the rights and welfare of all human participants involved in research conducted at the College or by members of it.

Website: https://www.medaille.edu/institutional-review-board

Research, Grants & Assessment at Medaille College

Post-Award Responsibilities

- Project Director/Principal Investigator (PI)
  - General Administration for their respective grant, including:
    - Budget updates,
    - Attending training and other workshops required by the grant agency,
    - All reports due to the grant agency and Medaille College.
  - The Grants Manager and the Finance Department are **not** responsible for drafting reports, but will review and make suggested revisions on drafts. The Grants Manager will also archive the final reports on the Medaille Server.
  - Communication with the Grants Manager
    - Submit an excel spreadsheet (template will be provided) with a list of reporting deadlines for their grant to the Grants Manager. After reviewing the calendar, the Grants Manager will then send a document of check-in dates, and due dates of drafts of grant reports. The Grants Manager and PI will meet in advance of reporting deadlines to discuss any revisions that need to be made to the reports. The final report to be submitted to the grant agency by the PI (must also be submitted to the Grants Manager.
Post-Award Responsibilities (con’t)

- **Project Director/Principal Investigator (PI)** Provide a report at the end of each semester of all grant activities to the Grants Manager. This will be provided via the *Grant Institutional Reporting form*. This is separate from the granting agency’s reports, but can include any important information from such reports. It should include any updates in numbers, events, or other significant information that occurred during the semester. Specific due dates of these reports will be given to the PD/PI by the Grants Manager at the beginning of each semester.
  - Obtain access to Web Finance and meet with the College Controller to discuss financial needs and expenditures of the grant.
  - Submit all reports (internal and external) ON TIME. If the PI/PD anticipates that a report will be late, a meeting will be held with the PI, the Grants Manager, and the Vice President of Academic Affairs to discuss.
  - Distribute and collect monthly Time & Effort forms for all grant-funded employees. Once executed, Time & Effort forms will be sent to the Grants Manager for record keeping purposes.
Who To Contact?
Jodi Hammond-Axberg – Grants Manager
   jph344@medaille.edu
   (716) 880-2346

Dr. Jeffery Faunce - Associate Dean of Teaching, Scholarship, and Learning
   Jaf69@medaille.edu
   (716) 880-2813

Debbie Strychalski – Controller
   dstrychalski@medaille.edu
   (716) 880-2272

Stephen Kozak – Accountant
   Stephen.A.Kozak@medaille.edu
   (716) 880-2172

Dr. Lori V. Quigley – Provost and Senior Vice President
   Lori.v.quigley@medaille.edu
   (716) 880-2240/2241

Dr. Mary Todd – Associate Vice President, Assessment, Research & Grants (IR)
   mary.m.todd@medaille.edu
   (716) 880-2345

Institutional Review Board
   irb@medaille.edu
REQUIRED FORM FOR ALL GRANT APPLICATIONS!!
REQUIRED FORM FOR ALL GRANT APPLICATIONS!!

Please check appropriate box(es):
[X] Fiscal Agent  [X] Lead Agent  [ ] Partner Institution, with whom:

Type of proposal:  [ ] Research  [ ] Instruction  [ ] Public Service  [ ] Academic Support
[X] Student Services  [X] Institutional Support  [X] Plant/Operations/Maintenance
[X] Scholarship/Fellowship  [ ] Construction/Renovation  [ ] Other:

In addition to the Budget Pages/Justifications, please provide the following:
Anticipated Award Notification Date:  Project Begins:  Project Ends:
____________________________________________________________________
Total Request: __________________________ Direct Costs: __________________________
Indirect Costs: __________________________ Matching Funds: __________________________
Source(s) (account #s): __________________________
In-kind Commitments (and sources): __________________________
Total Project Cost: __________________________ Comments: __________________________

NOTE: This form is used for internal tracking purposes only, if an application requires a letter of endorsement from the college, the faculty member/applicant is responsible for requesting and obtaining such letter.

Project Director's Compliance Certification:
In accepting external funds, Medaille College assures compliance with all Federal standards and policies specified in OMB Circulars and other regulatory directives regarding topics such as: Misconduct in Science, Significant Financial Disclosure (Conflict of Interest), Drug-Free Workplace, Protection of Human Subjects in Research, Proper Care and Use of Animals in Research, and other issues mandated in the application materials. I certify that I understand the above information and will comply with these policies in administering any grant/contract received in response to the application now being made. By signing below, I certify that I have read and further testify that all statements contained herein are accurate and truthful to the best of my knowledge and belief.

________________________________________  __________________________
Project Director  Date

INSTITUTIONAL APPROVAL SIGNATURES (in sequence). Signature denotes support. Please attach a brief explanation if you DO NOT support this proposal. It is the responsibility of the signer to deliver this form and attached materials to the next office for signature.

________________________________________  __________________________
Department Chair/Direct Supervisor  Date

________________________________________  __________________________
Chief Financial Officer  Date

________________________________________  __________________________
Provost & Senior Vice President  Date
GRANT REPORT PROCESSING FORM

This form is to be used prior to submitting a grant-related report for an official college signature. No new proposals or reports (financial or performance), should be submitted without the appropriate signatures as listed below.

Please attach a copy of the report to this form.

NAME OF GRANT/CONTRACT: ________________________________

Report Due to Sponsor by: ________________________________

Type of Report:  
☐ Interim Report  
☐ Final Report  
☐ Grant Proposal  
☐ Grant Budget Amendment  
☐ Other: ________________________________

Person Completing Report: ________________________________

Date: ________________________________

Direct Supervisor: ________________________________

Date: ________________________________

Grants Manager: ________________________________

Date: ________________________________

Business Office: ________________________________

Date: ________________________________

Does the proposal include any personnel expenses?  
If so, please have the Director of Human Resources sign here:

_________________________________________  Date: ________________
# Labor Redistribution Form

**Payroll Department**

18 Agassiz Circle

(718) 880-2266

## Employee Information

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Banner No.</th>
<th>Position No.</th>
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<table>
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<tr>
<th>Begin Year</th>
<th>Pay Date</th>
<th>End Year</th>
<th>Pay Date</th>
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</tbody>
</table>

## Current Distribution

<table>
<thead>
<tr>
<th>Org Description</th>
<th>Fund</th>
<th>Organization</th>
<th>Account</th>
<th>Program</th>
<th>%</th>
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<tbody>
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</table>

Total Must = 100%

## Revised Distribution

<table>
<thead>
<tr>
<th>Org Description</th>
<th>Fund</th>
<th>Organization</th>
<th>Account</th>
<th>Program</th>
<th>%</th>
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</thead>
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</table>

Total Must = 100%

## Reason for Change (Must be Completed):


## Approvals

Director/Dean of Chair:

Print Name:  
Signature:  
Date:  

Vice President:

Print Name:  
Signature:  
Date:  

Vice President for Business & Finance:

Print Name:  
Signature:  
Date:  

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**Note:** Redistributions can only be made to an open fiscal period.
**Time and Effort Certification Report**

Federal regulations require certifications for all College employees whose salaries are paid in whole or in part by a federally sponsored project. In order to comply with the federal regulations 2 CFR §200.430 and the College’s Time and Effort Reporting Policy, each employee working on federal and/or non-federal sponsored project(s) needs to complete this form monthly. We recommend completing it on the same day that you submit your Monthly Leave Report.

Principal Investigators/Project Directors are responsible for the distribution, collection and submission of all employee Time and Effort Reports for their sponsored project(s). Please send the completed form to the Office of Assessment, Research & Grants by the 5th of the month following the month being reported. All completed forms will be retained in the Grants Manager’s Office. If you have any questions, please call the Office at ext. 2346.

**Name**
**Title**
**Department**
**Reporting Period**

Please provide a breakdown of your responsibilities for the month being reported. Report all activities, federal and non-federal. The total must equal and cannot exceed 100% Effort.

<table>
<thead>
<tr>
<th>ACCOUNT NUMBER</th>
<th>% EFFORT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Institutional Activities (teaching, administration, service, etc.)</strong></td>
<td>%</td>
</tr>
<tr>
<td></td>
<td>%</td>
</tr>
<tr>
<td><em><em>Sponsored Activities (Externally funded</em>)</em>*</td>
<td>%</td>
</tr>
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<td></td>
<td>%</td>
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<tr>
<td></td>
<td>%</td>
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<td></td>
<td>%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

I certify, to the best of my knowledge and belief, that the above distribution of activities reasonably reflects actual effort devoted during the stated reporting period. By signing this report I am aware that any misrepresentation of information may be subject to penalties under the Federal False Claims Act.

______________________________  ______________________________
Employee Signature              Date

______________________________  ______________________________
Confirming Signature (Print Name)  Date

**Note:** If the employee named above is also the PI/PD, please have the Department Chair or Dean sign as the person confirming this certification. If the PI/PD is the Department Chair, the Dean must sign. If the PI/PD is the Dean, the VPAA must sign. The PI/PD may sign for all other salaried employees working on the project.

*Externally funded activities: Percentages should reflect time paid by the grant as well as unpaid time contributed to the project (i.e., Salary and wages of employees used in meeting cost sharing or matching requirements).

<table>
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<tr>
<th>Office Use Only</th>
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<tbody>
<tr>
<td>Office of Grants Administration  Date Received  Submitted to Controller</td>
</tr>
<tr>
<td>Office of the Controller  Date Received  Journal Entry Date</td>
</tr>
</tbody>
</table>
100% means 100% -- The total of time charges must always equal 100% of your time. You cannot charge time exceeding 100% of your time. Even if you work overtime you could not say that you spent 80% of your time on one particular federal project and 40% of your time on a privately funded project.

 Managers not taking the process seriously – Managers should make sure that employees record the actual time they spent on different cost objectives.

 Not appreciating the scope of the False Claims Act – Incorrectly charging time to federal criminal penalties.

 Executing certifications prior to the end of any funding period – Certifying of time needs to occur after the end of the period that is being certified. For example, time for August cannot be certified on August 28th.

The University of Florida is involved in a federal settlement to repay nearly $20 million to the United States government.

The U.S. Department of Justice announced a settlement Friday afternoon in allegations that the university "improperly charged the U.S. Department of Health and Human Services for salary and administrative costs on hundreds of federal grants." According to the release, the investigation into improper use of funds covered a period between 2005 and 2010.

UF officials say that they first discovered the misuse of funds nine years ago and the issues “have since been remedied with significant upgrades in systems and procedures,” according to a press release.

“The investigation by the Department of Justice was over a large cadre of grants, nearly 1,900 grants in all, with a total amount of money involved close to a billion dollars,” said David Norton, vice president for research for the University, in an interview with WUFT News.

The UF release said this $19.875 million settlement represents 2 percent of total HHS grants to the University.

Finance Department

- Chart of Accounts/Budget Lines
- Budget Transfer vs Reclassification
- Check Cashing Policy
- Credit Card Purchases Policy
- Forms
  - (Check Request, Tax Exempt, Credit Card Use)
- Web*Finance
- Excel Knowledge
Budget Lines - Review

• 12 Digit Number: FUND-ORGN-ACCT
  • Fund: “Purpose”
  • Orgn: “Who”
  • Acct: “What”

• Activity Codes: FUND-ORGN-ACCT-ACTV
  • Optional. Not usually used
  • Can be helpful to track expenses (ex. Summer vs Fall/Spring)
### Budget Transfer vs. Reclassification

**Budget Transfer**
- For spending that hasn’t happened yet

**Reclassification**
- For spending that has already happened
  - Email Deb S. with the following information from Web*Finance:
    - Invoice Number
    - Date of the transaction
    - Dollar Amount
    - Budget Line the expense was incorrectly coded to
    - Budget Line you would like expense transferred to
    - Brief explanation
  - The correction will appear in WF as an adjusting entry on both affected accounts
Check Processing & Purchasing Policy

Medaille College is a tax exempt organization. You are expected to make every effort to obtain tax exemption on your transactions. A NYS Sales Tax Exempt form can be obtained from Susan Page at Ext 2609, Diane Schiavone at Ext 2304 or Deborah Strycharski at Ext 2272.

CHECK PROCESSING PROCEDURES

Checks are processed once weekly and are available each Friday after 2:00 pm. The Accounts Payable Department (Susan Page @ ext 2609) must receive all requests for payment by close of business the Friday preceding the check date.

ALL CHECK REQUESTS MUST INCLUDE THE FOLLOWING TO BE ELIGIBLE FOR PAYMENT:

- Vendor Name, Correct Address and, if a new Vendor, SS# or Tax Id #, if applicable
- Supporting Documentation – An Original Invoice must be submitted.
- Photocopies will not be accepted.
- Budget Line to be Charged
- Authorized Signatures – If over $500, must be signed by Rob McDow prior to being sent to Accounts Payable

LOST CHECKS

In the event a check is thought to be lost, there will be a minimum waiting period of two weeks from the date of issuance before a Stop Payment Order will be placed.

PURCHASE REQUISITIONS

Purchases using Federal Funds must obtain three quotes.

Purchase Requisitions must include the following information for a Purchase Order to be generated:

- Vendor Name, Address, Phone Number and Fax Number
- Budget Line to be charged
- Item Number(s) and Description(s)
- Total of Purchase Requisition
- Authorized Signatures

Upon completion, all Purchase Requisitions should be forwarded to Fran Rogers (ext 2525).
If you have any questions, please contact either Susan Page @ ext 2609 or Fran Rogers @ ext 2525.

PURCHASE ORDERS

- When ordering using a Purchase Order, please inform the vendor that the purchase order # must be included on the invoice
- After the merchandise has been received, initial the invoice and forward it to Susan Page
- You do not need to submit a check request to generate payment for an invoice from a purchase order

PETTY CASH

Petty Cash transactions are limited to $75 per day. Original receipts must be provided for all transactions. Please contact Diane Schiavone @ ext 2304 to arrange for reimbursement.
# CHECK REQUEST

Accounts Payable Department  
18 Agassiz Circle  
(716) 884-3411

<table>
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<tr>
<th>Item to appear on Check</th>
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<td>Address 1</td>
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<td>Address 2</td>
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<td>City</td>
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<td>State</td>
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<td>Zip</td>
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To be Form or Beneficiary a U.S. Citizen or Permanent Resident Alien?  
Yes ☐ No ☐

Is the Payee employed by Medaille?  
Yes ☐ No ☐
Date of Disbursement ☐

<table>
<thead>
<tr>
<th>Please use currency symbol</th>
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<tbody>
<tr>
<td>Invoice No. (Only one invoice per Check Request. Attach original invoice)</td>
<td></td>
</tr>
<tr>
<td>Check Distribution Instructions</td>
<td>U.S. Mail ☐ Pick Up ☐ MAIL WITH ENCLOSED ☐ U.S. POSTAGE ☐ CAMPUS MAIL ☐ (Send to cashier table. Check copy of form)</td>
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<tr>
<th>Field Code</th>
<th>City Code</th>
<th>Account Code</th>
<th>Agency Code</th>
<th>Dept/Center Code</th>
<th>Amount</th>
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*Activity Code is Optional*

If attachment is required, please attach a separate sheet. DO NOT USE ATTACHED CHECK Request form.

Director (Fiscal Officer)  
Field Name: Signature: Date:  
President/Dean  
Field Name: Signature: Date:  
Vice President for Business & Finance
CREDIT CARD POLICY & PROCEDURES

As a Medaille College Corporate Cardholder, you are responsible for the transactions on your statement. Purchases made on a Medaille College credit card must be for College related business only.

The credit card is to be used for business related travel expenses and expenditures that cannot be accommodated through the normal purchasing process (purchase orders and check requests). The card should not be used to purchase gas for a personal vehicle during business travel. In this instance, a mileage reimbursement form should be completed.

After two violations of this policy, upon review by the Vice President for Business & Finance, your card may be revoked.

It is the cardholder’s responsibility to notify a merchant that Medaille College is a tax exempt organization. You are expected to make every effort to obtain tax exemption on your transactions. A state tax exempt form can be obtained from either Susan Page at ext 2000 or Deborah Strycharski at ext 2272.

The credit card is the property of Medaille College and should be secured just as you would secure your personal credit cards. If the card is lost or stolen, contact Deborah Strycharski at ext 2272 immediately.

- Upon receipt of the Monthly Credit Card Statement, the statement is reviewed by the Accounts Payable Specialist (Susan Page) and forwarded to the Bookkeeper (Diane Schiavone).
- The Bookkeeper inputs each individual transaction into an excel spreadsheet and forwards an electronic file to each individual cardholder with their respective charges.
- The cardholder lists next to each transaction the reason for use as well as the budget line to charge the expense to in the electronic file.
- All original receipts must be attached to the monthly credit card justification form.
- The monthly credit card justification form must be signed and approved by your division head.
- The cardholder is asked to return this completed file within five business days to the Bookkeeper.
- When all cardholder files are collected the Accounts Payable Specialist compiles a comprehensive packet for the VP for Business & Finance (Matthew Carver) to review, which includes the complete credit card statement, supporting cardholder files & original receipts. Upon completion, the statement is signed and then returned to the Accounts Payable Specialist.
The credit card purchase request is intended for use when the normal purchasing policy is not applicable. In general, you should use the process of PO’s and check requests.
New York State Department of Taxation and Finance
New York State and Local Sales and Use Tax
Exempt Organization
Exempt Purchase Certificate

□ Single purchase certificate
□ Blanket certificate

Your exempt organization number is not your federal employer identification number. (see destruction)

Exempt organization number (EIN): 114500

Name of exempt organization applicant:

Medaille College

Street address:

18 Agassiz Circle

City/State/ZIP code:

Buffalo, NY 14214

The exempt organization must be the direct purchaser and payer of record.

You may not use this form to purchase motor fuel or diesel motor fuel exempt from tax.

Representatives of governmental agencies or diplomatic missions may not use this form.

Carefully read the instructions and other information on the back of this document.

I certify that the organization named above holds a valid Form ST-119, Exempt Organization Certificate, and is exempt from New York State and local sales and use taxes on its purchases.

Certification: I certify that the above statements are true, complete, and correct, and that no material information has been omitted. I make these statements and issue this exemption certificate with the knowledge that this document provides evidence that state and local sales or use taxes do not apply to a transaction or transactions for which I tendered this document and that willfully issuing this document with the intent to evade any such tax may constitute a felony or other crime under New York State Law, punishable by a substantial fine and a possible jail sentence. I understand that this document is required to be filed with, and delivered to the vendor as agent for the Tax Department for the purposes of section 138 of the Tax Law and is deemed a document required to be filed with the Tax Department for the purpose of prosecution of offenses. I also understand that the Tax Department is authorized to investigate the validity of tax exclusions or exemptions claimed and the accuracy of any information entered on this document.

Print or type name of officer of organization:

Deborah A. Strachalski

Signature of officer or organization:

Deborah A. Strachalski

Tax Controller

Date issued:

12/11
Finance Department

Excel Knowledge
Final Thoughts

• Please, Know Your Grant
  • Requirements, reporting timelines, budget and spending
• Finance Department can be a “watchdog”... but only to a point
• Web*Finance has more detail that your grant budget.... Use it as a crosswalk for fiscal compliance.
• For Grants that have different funding periods than our college fiscal period, Finance (Deb) provides you with a spreadsheet that is updated quarterly as a tool to help you manage your spending and funds.
• Payroll allocations and redistribution – your responsibility – reach out to Mark Taylor and “cc” both Deb Strychalski & Jodi Hammond.
• WE ARE ALL ON THE SAME TEAM!
QUESTIONS
COMMENTS
CONCERNS?

WE WANT YOUR FEEDBACK!
Who To Contact?
Jodi Hammond-Axberg – Grants Manager
   jph344@medaille.edu
   (716) 880-2346

Dr. Jeffery Faunce - Associate Dean of Teaching, Scholarship, and Learning
   Jaf69@medaille.edu
   (716) 880-2813

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   Stephen.A.Kozak@medaille.edu
   (716) 880-2172

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   Lori.v.quigley@medaille.edu
   (716) 880-2240/2241

Dr. Mary Todd – Associate Vice President, Assessment, Research & Grants (IR)
   mary.m.todd@medaille.edu
   (716) 880-2345

Institutional Review Board
   irb@medaille.edu