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# Tips for Invoicing and Budgets

Brad McCormick, Financial Advisor

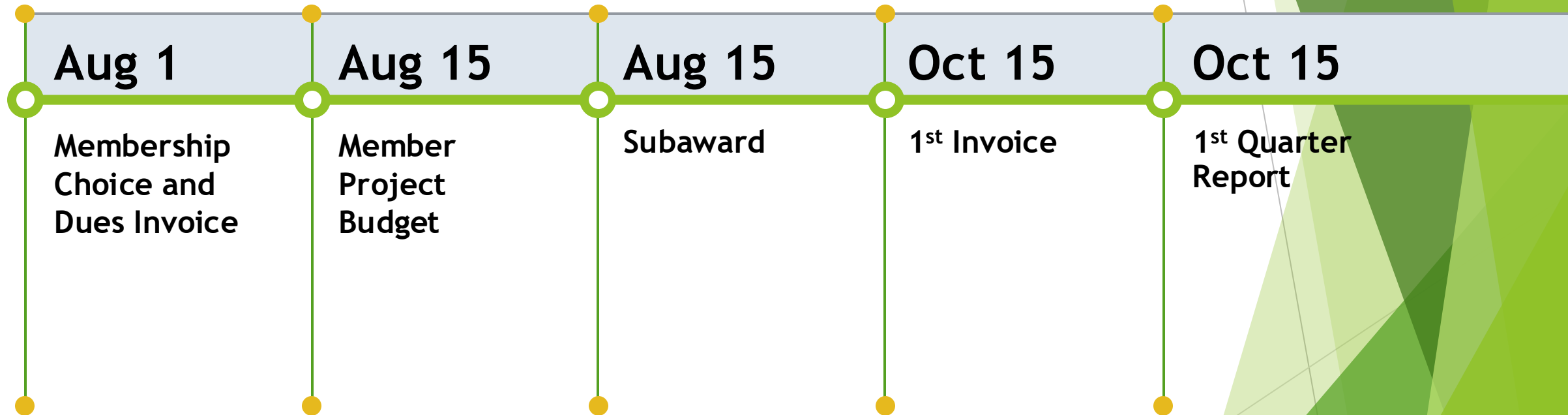
IGEN Annual Conference

April 15, 2026



# Get Started

## *IGEN Timeline*



# Project Budget Form

- ▶ Don't Start Project Until Appendix A - Project Budget Form is Approved
- ▶ Don't Change Your Project without Approval

ANTICIPATED BUDGET (Choose **Affiliate** OR **Full** to match your membership choice.)

Budget Expenditure Category	Amount Requested (Affiliate)	Amount Requested (Full)	Cost Share (not required)	Description
Personnel (Salaries & Wages)	XXXXXX	\$10,000	Click or tap here to enter text.	Click or tap here to enter text.
Fringe Benefits	XXXXXX	XXXXXX	Click or tap here to enter text.	Click or tap here to enter text.
Travel	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Equipment	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Supplies	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Contractual Services	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Construction	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Occupancy (Rent & Utilities)	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Telecommunications	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Training & Education	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Miscellaneous	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
<b>Total</b>	<b>\$5,000*</b>	<b>\$15,000*</b>	Click or tap here to enter text.	Click or tap here to enter text.

\*Based on completion of program/project(s) and documented expenditures by **March 31<sup>st</sup>**. All funding is provided through reimbursement.



# Invoicing Stumbling Blocks

- ▶ Reimbursement-based program.
- ▶ Out of order invoice #'s.
- ▶ Staff Salary Offset
  - ▶ No name(s) listed.
  - ▶ Lack of proof of payment. (actual payment instead of promise to pay)
- ▶ Project Expenses
  - ▶ Invoice from vendor missing.
  - ▶ Proof of payment missing.
  - ▶ Or....credit card bill, but not proof of payment of card payment.
- ▶ Promise to pay not equal to paying.

# Reporting



“What if we haven’t started?”

- Answer: Do it anyway.

Submit Quarterly and Final Reports through Zengine

- Why?
  - IEPA Reporting from IGEN
  - We Don’t Like to Cut & Paste
  - Removing Reports from Website for FY27

**Illinois Green Economy Network (IGEN) - Illinois Environmental Protection Agency Grant  
Invoice/Payment Request  
Energy Benchmarking and Efficiency at Community Colleges (EBECC)**

*(Attach backup documentation, including invoices with check copies and/or payroll registers, as appropriate)*

Invoices are to be uploaded to respective portal. Upon uploading, the portal automatically notifies the appropriate IGEN staff member so the invoice can be processed.

Subaward #: \_\_\_\_\_

Address questions to:

Brad McCormick, Financial Advisor

[brad.mccormick@igencc.org](mailto:brad.mccormick@igencc.org)

[EBECC Portal](#)

College Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

EIN: \_\_\_\_\_

Email: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Request #: \_\_\_\_\_

*Please indicate if this is a "FINAL" invoice.*

Category	Prior Requests	Current Request*	Cumulative Costs
Personnel (Salary & Wages)	_____	_____	_____
Travel	_____	_____	_____
Printing	_____	_____	_____
Equipment	_____	_____	_____
Contractual Services	_____	_____	_____
Construction	_____	_____	_____
<b>Total:</b>	<b>50.00</b>	<b>50.00</b>	<b>50.00</b>

Please provide a brief description for current invoice/payment request below:

*By submitting this invoice/payment request, I certify to the best of my knowledge and belief that the request is based on true, complete, and accurate information, and the expenditures and disbursements made with these funds are for the purposes and objectives set forth in the terms and conditions of the program participation agreement.*

Signature of Authorized Representative \_\_\_\_\_ Title \_\_\_\_\_

**DO NOT SUBMIT YOUR INVOICE:**

- Complete the form and print. Include either digital signature or sign.
- Combine the form with all attachments and scan the package together.
- Save your file as a PDF as follows: [college name].[your name].[igen project identifier number].INVOICE[#]
- Upload your PDF file to the respective portal using the links provided at the top of this page. Page signed and submitted to the portal or via email shall have the same legal effect as original.

IGEN/IJC Use Only:

Invoice #:

Date:



# Questions

1. Who submits the invoices at your college? (liaison, grant manager, facility staff, finance staff)
2. Does same person that submits quarterly/final reports also submit invoices? (Yes/No)
3. If you were asked to choose your membership project in the spring prior to the year, but that be better or worse? (Better/Worse)