

Guidelines for Grant Application and Administration

1. Analyze the grant opportunity to determine if the grant is worth pursuing. Make sure the work required to write and administer the grant is worth the benefit received. The grant must fit into the District's goals and curriculum. Make sure the grant does not violate any District Policy or Law.
2. Gain approval from your immediate Supervisor to apply for the Grant.
3. When drafting a grant proposal, carefully consider the timing of the expenditures and plan to spend the money as soon as possible in the grant period. This permits flexibility in case: a) supplies are discontinued, b) equipment is back ordered, or c) course offerings are changed. Once grants have been approved, budgetary changes are difficult to execute.
4. Develop the grant budget with descriptions of planned expenditures, and what location, building or program will benefit and designate dollar amounts. Fill out the Grant Application Checklist (at the end of this document).
5. Forward **all** grant documents and correspondence to the Director of Fiscal Affairs. This would include a copy of the grant application, approval letter, guidelines, narratives, budget documents, etc...
6. Upon grant approval, communicate with the Director of Fiscal Affairs to be assigned a funding source code (a number specific to your grant), fine tune your budget, string together account numbers, and communicate all items needed to meet the requirements of the auditors. At this time, you should have completed the attached Grant Application Checklist. This is necessary to capture all requirements of the grant for our auditors.
7. Complete requisitions as soon as possible after grant approval. Be sure to include the assigned funding source code. If you fail to include the funding source code, your budget will be charged for the expenditures. Send Administrator approved requisitions to District Office for the purchase order to be created in the system.
8. If applicable, forward quarterly reports to the Director of Fiscal Affairs within 5 working days of the end of the quarter. Be sure to include the mailing information with the quarterly reports. The report will be reviewed, copied, filed, and mailed. The same process needs to occur for the financial portion of the Final Completion Report. Both financial and narrative portions of the Final Completion Report should be forwarded to District Office to be reviewed, signed, copied, and mailed.

In Summary:

- Expenditures must follow the grant budget. If there is a change in the spending plan, approval from the grant administrator is usually needed. Change often necessitates:
 - Filing amended budgets
 - Adding new account numbers
 - Revising financial reports

- Revised budgets often need to be filed for 10% variance in any budget line item. If you have a budget line item of \$250, you might have to file an amended budget for a \$25 change. Hint: Keep the line item dollar amounts large.

- Expenditures in the financial system must agree with your records and the final authority is the financial system. That is, if a purchase is made without a purchase order, it will not be in the financial system. If the error is not detected before the end of fiscal year, the expenditure when finally reported, may have to be paid out of next year's building budget and the unexpended grant dollars will need to be returned to the Grantor.

- **All** documentation must be given to the Director of Fiscal Affairs to keep a grant "folder" for our auditors. This is very important that we have all required documentation for the grant.

- If you have any questions, call the Director of Fiscal Affairs. Early communication will keep us all on track, reduce adjusting journal entries, and reduce subsequent paperwork.

Grant Application Checklist

Person Completing the Form: _____

District Contact (if different from person above): _____

- Dollar amount of grant application \$ _____
- Do Grant expenditures include labor? ____ Yes ____ No
 - If yes, who will be charged to the grant _____
- Is the grant (check one funding stream) ____ Federal ____ State ____ Local
- Where is the funding coming from (FEMA, PDE, Chamber of Commerce, etc...)

- What is the name of the grant _____
- Who is the contact for this grant _____
 - Address _____
 - Phone Number _____
 - Fax Number _____
 - Email _____
- Does the grant require the Superintendent's signature ____ Yes ____ No
- When can we begin spending the money _____
- When is the last day we can spend the money _____
- Are quarterly reports required ____ Yes ____ No
- Is there a final expenditure report required ____ Yes ____ No
- Any other Compliance/Reporting requirements not covered above (for example: required site visits by Grantor, Narratives, Activities required by District, etc...)

Signed: _____

Date: _____