



Grants Process Overview

	Application	Award	Implementation	Closeout
Grant Development	<ul style="list-style-type: none"> <input type="checkbox"/> Review RFP <input type="checkbox"/> Gather input from Strategic Plan, Administrators <input type="checkbox"/> Develop Rough outline of proposal <input type="checkbox"/> Develop Goals, Activities and Outcomes <input type="checkbox"/> Develop Budget and Evaluation plan <input type="checkbox"/> Assemble Application Package <input type="checkbox"/> Provide Strategic Quality Control/ Assurance (no mission creep, no errors) <input type="checkbox"/> Route for approval and signatures <input type="checkbox"/> Submit Package on Time 	<ul style="list-style-type: none"> <input type="checkbox"/> All Documents save to the L Drive: <ol style="list-style-type: none"> 1. RFP and/or instructions 2. SPPS' pre-approval form 3. Board Approval 4. Final Application 5. Routing Sheet (orange) 6. Budget 7. Sponsor Forms 8. Non-Standard Attachments <input type="checkbox"/> Handoff to Management 		
Grant Management	<ul style="list-style-type: none"> <input type="checkbox"/> Review and approve budget, assurances and contracts prior to submission 	<ul style="list-style-type: none"> <input type="checkbox"/> Receive grant from development <input type="checkbox"/> Approve and Route Grant Agreement <input type="checkbox"/> Set up budget per the application <input type="checkbox"/> Establish People Soft Project <input type="checkbox"/> Meet with grant manager and/or implementation team to review award docs, rules, roles, responsibilities and timelines. <input type="checkbox"/> Finalize management structure with senior leaders 	<ul style="list-style-type: none"> <input type="checkbox"/> Provide any support to GM on demand <input type="checkbox"/> Monitor budget quarterly <input type="checkbox"/> Approve Journal Entries as needed <input type="checkbox"/> Coordinate revisions <input type="checkbox"/> Monitor reporting <input type="checkbox"/> Monitor revenue <input type="checkbox"/> Support REA and BFA as needed 	<ul style="list-style-type: none"> <input type="checkbox"/> Ensure SPPS submits final reporting and receives closeout approval <input type="checkbox"/> Store all grant artifacts <input type="checkbox"/> Close out project in PS

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Accounting	<ul style="list-style-type: none"> <input type="checkbox"/> Advise on Budget 	<ul style="list-style-type: none"> <input type="checkbox"/> Establish budget code (from GMC) <input type="checkbox"/> Set up reporting schedule per award <input type="checkbox"/> Set up invoicing or draws 	<ul style="list-style-type: none"> <input type="checkbox"/> Maintain accurate records <input type="checkbox"/> Approve purchases per guidelines <input type="checkbox"/> Request GM/GMC to revise budget <input type="checkbox"/> Train/support GM to manage budget <input type="checkbox"/> Monitor budget to actual <input type="checkbox"/> Ensure revenue is received <input type="checkbox"/> Prepare and present financial reports <input type="checkbox"/> Attend funder trainings/meetings <input type="checkbox"/> Respond to audits <input type="checkbox"/> Support GM in A133 process 	<ul style="list-style-type: none"> <input type="checkbox"/> Prepare final reports with GM <input type="checkbox"/> Ensure all revenue is received <input type="checkbox"/> Deactivate Budget Codes <input type="checkbox"/> Prepare documents for storage/audit
REA	<ul style="list-style-type: none"> <input type="checkbox"/> Participate in developing Goals, Strategies and Outcomes <input type="checkbox"/> Develop Evaluation Plan 	<ul style="list-style-type: none"> <input type="checkbox"/> Review data collection and evaluation plans <input type="checkbox"/> Develop data sharing agreement as needed <input type="checkbox"/> Assign staff to project as needed <input type="checkbox"/> Work with grant manager to develop bid for evaluation services <input type="checkbox"/> Set baselines 	<ul style="list-style-type: none"> <input type="checkbox"/> Deliver data and reports as scheduled <input type="checkbox"/> Collect data <input type="checkbox"/> Collaborate with GM to use evaluation formatively <input type="checkbox"/> Monitor the work of consultants <input type="checkbox"/> Present findings to appropriate audiences 	<ul style="list-style-type: none"> <input type="checkbox"/> Prepare final reports with GM <input type="checkbox"/> Present outcomes as appropriate
Grant Manager/ PI	<ul style="list-style-type: none"> <input type="checkbox"/> Provide Subject Matter Expertise to development team 	<ul style="list-style-type: none"> <input type="checkbox"/> Review grant application and award docs <input type="checkbox"/> Establish workplan <input type="checkbox"/> Sign up for trainings needed <input type="checkbox"/> Attend funder meetings <input type="checkbox"/> Submit requisitions to HR for staff <input type="checkbox"/> Submit requisition to purchasing for consultants <input type="checkbox"/> Create/convene any advisory committees 	<ul style="list-style-type: none"> <input type="checkbox"/> Implement and lead project per workplan <input type="checkbox"/> Supervise project staff <input type="checkbox"/> Document project activities <input type="checkbox"/> Procure goods and services to meet goals <input type="checkbox"/> Adhere to district and funder guidelines <input type="checkbox"/> Collaborate with GMC, REA, BFA to accomplish goals <input type="checkbox"/> Alert supervisor and GMC to any concerns <input type="checkbox"/> Prevent waste, fraud and abuse <input type="checkbox"/> Manage Budget <input type="checkbox"/> Ensure reports are submitted on time 	<ul style="list-style-type: none"> <input type="checkbox"/> Wrap up final activities <input type="checkbox"/> Prepare and submit final report <input type="checkbox"/> Collaborate with HR to place grant staff in new positions or on lay-off <input type="checkbox"/> Present project outcomes to appropriate audiences <input type="checkbox"/> Deliver all artifacts to GMC for storage.