



Grants & Development Department

DIVISION OF BUSINESS AND FINANCE

Grant Owner's Toolkit

2022-2023

www.fwisd.org/grants



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DIVISION OF
BUSINESS AND FINANCE

GRANT AT A GLANCE

Congratulations on your new grant award! Complete this sheet and keep it handy so that you will always have important funding information at your fingertips.

Grant Name

Grantor

Grant Purpose

Grant Start

Grant End

Grant Amount

Subject to EDGAR?

MUNIS (budget system) Project Code

Grant Reporting Requirements

Grants Department Main Line: 817.814.2280

Grant Development Contact (Name, Phone, and Email):

Grant Evaluation Contact (Name, Phone, and Email):



I. ROLES AND RESPONSIBILITIES

While the Grants Department is always here to advise on compliance and best practices, as the grant owner or coordinator, you possess ultimate responsibility for maintaining compliance with all stated grant requirements and guidelines.

To begin:

1. Familiarize yourself with the Grant Manual.

An electronic version can be accessed on the Grants Department webpage.

2. Become the content expert of your grant.

Review the grant application and ensure understanding of grant logistics and various components such as:

- A. The program guidelines, including performance metrics, goals, and activities to be implemented
- B. Management of assessments and collection of reporting data
- C. Allowable and unallowable expenditures and activities
- D. Payroll
- E. Reporting deadlines
- F. Staffing records including job descriptions and background checks
- G. District policies and procedures
- H. Coordination of the District's response to audit requests
- I. Timely response to grantor requests
- J. Anything else listed in the contract, program guide, or Notice of Grant Award (NOGA)

You are responsible for making sure you keep copies of these documents on-hand, though the Grants Department is happy to assist you in collecting them.

The Grants Department will assist Budget personnel with allocating your funds in MUNIS in accordance with the grant application and requesting budget access for your department. You and your admin will be given access to complete budget transfers and to run year to date budget reports as part of your responsibilities as a grant owner. The Grants Department provides training resources on its website to assist you in completing these tasks.



With regard to contracts, board items, and procurement, it is the responsibility of the grant owner to:

- Follow grant-specific purchasing requirements. This includes obtaining quotes and completing the
- Education Department General Administrative Regulations (EDGAR) documentation.
- Initiating requests for proposals when necessary.
- Creating and routing contracts and memoranda of understanding. These are to be sponsored by the grant owner's division's Chief.
- Reserving space on the board agenda for items requiring approval according to board calendar procedures and deadlines.

II. GRANT MANAGEMENT, ASSESSMENT, AND DATA COLLECTION

For successful management of your grant, including assessment and data collection, follow these steps:

1. Create a binder.

Place your "Grant at a Glance" page in the front. Add the following dividers to help you organize your grant documentation. This binder must be maintained at the campus for seven years from the end of the grant in case of an audit by the funder. (Your binder can be electronic.)

- A. Copy of the Grant Narrative, Budget, and any amendments or updates
- B. Copy of the Program Guidelines
- C. Copy of the Notice of Grant Award (NOGA)
- D. Agendas for grant meetings and events
- E. Sign-In Sheets for meetings, tutoring, events, activities, etc.
- F. Requisitions
- G. Contracts and Memoranda of Understanding
- H. Partnership Agreements if applicable
- I. YTD Budget Reports
- J. SIGNED Grant Funded Job Descriptions
- K. Time and Effort Documentation
- L. Copies of Compliance Reports, including performance metrics, logic models, etc., for reporting

2. Assemble a Grant Management Team.

Your grant management team should be comprised of the following:

- Grant Owner/Principal/Admin Staff
- Administrative Assistant or Requisitioner
- Grant Coordinator (if applicable)
- Other staff relevant to the project's implementation and success



- Assigned Grants Staff
- Budget staff member

3. Develop systems for fidelity of assessment and data collection.

To successfully develop and manage assessments and data collection procedures, work with your grant evaluator to determine what should be assessed (tracked), and to develop the tools and methods for collecting (tracking) the relevant data.

To ensure accuracy and minimize errors, consider the following:

- Plan for consistent and accurate assessment protocols
- Develop data entry procedures that will help minimize unintentional errors
- Utilize tools and collection methods that will help prevent mixing of data from different metrics
- Provide written documentation of assessment and data collection procedures, including checklists if appropriate
- Provide ongoing training and coaching on assessment and data collection procedures
- Periodically check for consistency and accuracy, and make adjustments if/where needed

4. Schedule meetings.

- Monthly meetings with your Grant Management Team (your team of District stakeholders, which includes your Grant Specialist, your Grant Coordinator, the Requisitioner, your assigned Budget, Accounting, and Procurement staff members, and any other relevant staff.)
- Quarterly meetings with your Advisory Council (your team of project advisors including District Leadership, outside partners, parents, and community stakeholders.)

5. Acquire personnel.

Hire personnel as specified by the grant. Maintain signed Talent Management approved Job Descriptions for all grant employees as well as any other relevant required documentation. Example: Active background checks if a funder requires them. All new positions and stipends must be approved by the Position Review Committee and sponsored by your division at the Chief level.

6. Coordinate purchasing.

Make a list of grant activities that will require purchase orders and contracts. Set a timeline for these



purchases to ensure items are received prior to when they are needed and that there is plenty of time for travel requests, RFPs, board items, and contracts to be executed. Identify which procurement methods will be required for each purchase.

7. Document time and effort.

Maintain time and effort documentation for partially funded staff and complete annual grant certifications as requested for fully funded staff. Time and effort information can be found on the Grants Department webpage.

8. Prepare for grant reporting.

Collect and prepare performance and implementation documentation.

9. Prepare for grant closure.

- Make sure that all POs are received prior to the grant's end date. Any funds that remain encumbered beyond the grant period due to unclosed POs will have to be covered by your local budget.
- Submit final reporting if applicable.

10. Other Items for Review.

DEPARTMENT RESOURCES

Accounts Payable:	817-814-2133
Budget Department:	817-814-2170
Grants & Development:	817-814-2280
Payroll Department:	817-814-2180
Procurement Services:	817-814-2200
Talent Management:	817-814-2717

III. PROGRAM IMPLEMENTATION

Successful implementation of your grant requires program fidelity. If programs are not implemented with fidelity as intended, it is difficult to determine their effectiveness. Consider five elements of fidelity for successful implementation:

1. Student Engagement:

- Are students attentive and involved?

2. Program Specificity:



- What is the unique contribution of this program? How does this program differ from other programs?

3. Quality of Delivery:

- Do staff involved in implementing the program have adequate knowledge, skills, and training?
- How well are aspects of the program being implemented/delivered?
- Are aspects of the program being implemented/delivered consistently?

4. Adherence:

- How well do staff involved in implementing the program follow the guidelines or plan of the program?
- Are program elements being delivered consistently across different settings or staff?

5. Exposure/Duration:

- Is the program being implemented according to the recommended dosage?
- How often (frequency) and how long (duration) are aspects of the program being implemented?
- Are necessary staff available?
- Are any factors impeding the recommended dosage of the program?

6. Key Data:

- Student Data: the number and names of students in a specific program or strategy and their demographics; and student attendance in a specific program with the services/interventions received.
- Cost Data: Staff fully-loaded costs; materials, supplies, transportation, and other ancillary costs associated with the program; and variable support costs such as leadership or facilities.
- Achievement data: student growth metrics before and after the program that is closely aligned to the goal of the program.

