

Multnomah Education Service District

Code: **DFC-AR(1)**
Adopted: 2/27/92
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10/12/10; 5/31/16

Grants Management

This administrative regulation establishes consistent procedures and responsibilities for the processing and handling of grants. It establishes the office of the public information officer as the clearinghouse for all Multnomah Education Service District (MESD) grants. It establishes the director of business services as the fiscal monitor and holder of all awarded grants. Finally, it establishes the director of the department applying for a grant as the holder of all grants that are approved for application. The department directors will continue to be responsible for the search for appropriate grants, grant applications, grant monitoring and compliance with grant requirements and all grant reporting.

Distribution of Grant Responsibilities

1. The responsibility of grant seeking, writing, submission, implementation, monitoring, fiscal reporting and program reporting resides with the appropriate department director.
2. The responsibility of reviewing and approving all contracts made pursuant to grant activities resides with the risk and contracts manager.
3. The responsibility for pre-approval to write a grant, approval of a grant for submission, assurance that approved grants are consistent with the MESD mission, approval of financial reports, claims and program reports resides with the public information officer. The superintendent or designee will inform the Board of successful grant applications.
4. The responsibility for monitoring the fiscal records, housing a copy of all awarded grant records and files, assisting to prepare grant budgets, verifying the accuracy of claims requests and preparation of resolutions resides with the director of business services.

Procedures

1. Before even applying for a grant, the grant originator must obtain approval from the public information officer. Approval must be documented on the "Grant Approval Check List."
2. After obtaining approval to apply for a grant from the public information officer, the grant originator must work closely with the director of business services, director of human resources and the department directors during the grant writing process to ensure correct information is in the application and to facilitate approval.

The grant originator must obtain approval for grant submission from the three previously mentioned individuals and document approval on the "Grant Approval Check List" before the grant application is submitted.

- a. The grant originator as part of the application must usually be required to identify and select partners and/or service providers. The grant originator may use one of three options for identification and selection:
- (1) Publish a notice for one day at least three calendar days prior to partner/service provider selection. The notice must be published in the *Daily Journal of Commerce* and the *Oregonian*. The notice also must be posted on MESD's website until the partners/service providers are selected. The grant originator may also publish a notice in more than one publication, publish the notice for more than one day, submit the notice to potential partners/service providers via email or listserv groups and directly call potential partners/service providers. The grant originator and department shall select and document selection of partners/service providers using selection criteria listed in the published notice. See Charts 1-3 for additional information.

OR

- (2) Publish and post the required notice listed in (1) which will include a day, time and location for a meeting with all interested potential partners/service providers. During the meeting the grant originator and department shall discuss grant requirements with attendees. The grant originator and department shall select and document selection of partners/service providers from attendees using selection criteria listed in the published notice. See Charts 1-3 for additional information.

OR

- (3) Publish and post the required notice listed in (1) at least 30 calendar days prior to partner/service provider selection. The notice shall include general statements regarding the types of grants which MESD applies for during a fiscal year and the types of partners/service providers generally selected for inclusion in a grant application. The notice shall also give instructions for expressing interest in being considered as a potential partner/service provider in the grant application process and describing the experience and services offered by the responder. The grant originator and department shall select and document selection of partners/service providers from the pool of responders using selection criteria listed in the published notice. See Charts 2-3 for additional information.

3. After a grant application has been approved by the necessary directors, the grant originator must:

a. Provide the following documents to the public information officer:

- (1) A completed "Grant Approval Check List";
- (2) A copy of the Grant Application;
- (3) A Letter of Transmittal (if letter is to be signed by the public information officer or superintendent); and
- (4) Description of the competitive selection process used to determine grant partners prior to grant submission.

b. Maintain a copy of the Grant Application in the originator's department records.

4. When a grant is awarded, it is the responsibility of the grant originator to notify the director of business services and public information officer. The grant originator must also provide the Business Department with an electronic copy of the Grant Application and Notice of Grant Award. The Business Department should only be provided with copies of grants which are awarded.
5. The public information officer will inform the superintendent of grants submitted and approved. The superintendent or designee will report to the Board regarding successful grant applications.
6. Grants that can be anticipated for the following school year will be budgeted for in the budget process to establish the authorization to spend grant dollars. This reduces the need for a Board resolution and supplemental budget.
7. If a Board resolution and supplemental budget are necessary, the resolution will be drafted by the appropriate department director and submitted to the director of business services, who will forward the material to the public information officer.
8. The appropriate department director will administer grant(s) and initiate all reports (program and fiscal) in a timely manner. Fiscal reports will be submitted to the director of business services. Fiscal and program reports will be submitted to the department directors for approval and submission to the proper authorities. A copy of all reports will be kept according to MESD's policies and procedures regarding public record retention.