PROCEDURE 2.38.0: EXTERNAL GRANT FUNDING

All external grants and award opportunities are to be coordinated through the institutional resources department. This procedure applies to new initiatives and existing projects seeking additional funding.

Step 1: Identify the need.

Sandburg's strategic plan, institutional leadership, Foundation priorities or the Annual Grants Plan identifies the program or project need. Existing projects coordinate with the institutional resources department.

Step 2: Review the opportunity.

The vice president of institutional resources, the vice president of business & finance and the grant administrator review the opportunity for eligibility, fit, timing, funding, match, sustainability and institutional commitments. The vice president presents the opportunity to cabinet, which decides whether to proceed.

Step 3: Prepare the proposal.

The grant administrator leads the collaborative preparation of the narrative, work plan, budget, data, evaluation, partner commitments and attachments, working with the business office, grant team and other employees as determined by the grant. Proposal information is entered in the grant application tracking spreadsheet by Institutional Resources.

Step 4: Approve and submit.

The grant administrator approves the final package. The vice president of institutional resources presents the application to the board of trustees for submission approval.

Step 5: Accept and initiate the award.

The board of trustees approves acceptance. The president signs the agreement, and the executed agreement is shared with the Business Office. Work and spending begin only after execution and budget activation. A grant initiation meeting is held as needed to confirm responsibilities, accounts, deadlines, measures, procurement, personnel, match and records.

Step 7: Implement and monitor.

The grant administrator manages activities, spending, deliverables, records and compliance as determined by the grant and the institutional grant management manual. Institutional Resources supports data and outcomes. The Business Office supports account setup, invoicing, financial reporting, audits and fiscal review. Required changes are approved before implementation.

Step 8: Report and close.

The grant administrator prepares required program and fiscal reports. Financial reports are provided to the Business Office for review at least five working days before the funder deadline. At closeout, the team completes deliverables, reconciles accounts, addresses equipment and unused funds, and retains records for three years or longer when required.

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