

AP 514 - MANAGEMENT OF SCHOOL BASED GRANT GENERATED FUNDS

Background

Schools searching to acquire additional funding and resources to provide enhanced educational opportunities for students of the District may engage in initiatives, such as grant writing, for the purpose of generating revenue. Applications for revenue generation through grants require prior notification of the Associate Superintendent.

The purpose of this Administrative Procedure (AP) is to ensure that all school-based grant generated revenues are safeguarded and controlled, the reputation of the District is protected, and that record systems are maintained to account for these funds.

Guidelines for grant generated funds:

The grant process follows a linear lifecycle with four phases:

- Phase 1: Pre-award – Funding opportunity announcement and application review
- Phase 2: Award – Award decisions and announcements
- Phase 3: Post-award – Implementation, monitoring and reporting
- Phase 4: Closeout – Final reporting and reconciliation

The following principles will govern the grant application process:

- The grant must support the District's educational philosophy and strategic plan.
- Awarded grants shall not dictate the educational program, or program delivery, that is offered to students.
- Awarded grants shall not require students to observe, listen to, or read commercial advertising and must comply with AP 153 – Advertising, Canvassing, and Commercial Solicitation.
- Awarded grants must not involve the District in anything that would appear to be taking an inappropriate stand on a contentious political, moral, or social issue.
- Recognition of the grant donor will only be through expressions of thanks on a school website or in a program or newsletter, or through a time limited post on a school's social media page. Any recognition or acknowledgment or advertising involving media (whether earned or owned), district-level social media, or other, must be approved by the Director of Communications. Any proposal for ongoing recognition or advertising must be approved by the Board.

Procedures

Phase 1:

1. Decisions in regard to grants in amounts less than \$500 will be made by principals in accordance with the principles listed above.
2. All proposals for grants in excess of \$500 will be submitted by the school principal to the Associate Superintendent for review prior to application.
3. Grants must be expended in alignment with the Grantor's criteria and not redirected to other projects or used to reimburse past expenditures.

Phase 2:

1. The principal is responsible for notifying via email the Associate Superintendent after being awarded a grant.
2. The principal is responsible for submitting grant documents in excess of \$500 to the Finance Department within ten (10) business days to be set up in the District's financial system, which may require creating special account strings to fully track the related activity.

Required documents are:

- 1) Grant Award Letter/Agreement
- 2) Completed Grant Information/Application Form
- 3) Appropriate Grant Funds

Phase 3:

1. Accounting of the grant funds must be maintained to enable an auditor to verify that funds have been used for the purpose for which they were collected.
2. All books will be closed off annually for the year ending June 30th unless the District is notified regarding a different end point.
3. A statement of receipts for the grant will be submitted annually to the District prior to June 30th. The school principal must certify this statement.
4. Assets purchased from grants will permanently remain the property of the school district.
5. The school principal is responsible for delivering the grant deliverables under the terms and conditions.
6. The school principal monitors costs and makes sure the costs are allowable and within the grant award.

Record Keeping

1. The school principal must maintain all documents (purchasing, bidding, and communications etc. with the grantor) even after the grant completion.
2. The school principal shall also forward all documents to the Finance Department. This is primarily for audit purposes.

Reporting

1. The school principal shall submit reports, as required, in a timely manner depending upon the grantor specified timeline.
2. Copies of the report must be given to the Finance Department at the same time for audit purposes.

Phase 4:

1. The school principal is responsible for following the specified close out procedure provided by the grantor.
2. Final close out reports shall be sent to the Finance Department within ten (10) business days.
3. The school principal maintains complete project file(s) during and after beyond project completion.

Audits

1. The Finance Department facilitates all financial audits and may reach out to the school principal for assistance if warranted.

Adopted: May 2, 2023