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| Procedure Number:           | CS 505  |
| Procedure Title:            | Grant Set-up and Operations Procedure             |
| Relevant Board Policy:      | C.1.3 Appropriations and Revenue Sources Relevant |
| SACSCOC Principle:          | 13.5 Control of sponsored research/external funds |
| Originating Unit:           | Office of Resource Development                    |
| Maintenance Unit:           | Office of Resource Development                    |
| Contact for Interpretation: | Director of College Grant Development             |

- I. Purpose: Northeast Lakeview College receives funding from government entities and foundations through competitive and non-competitive grants to supplement activities that contribute to the achievement of its strategic goals. The following steps outline the process to be followed for implementing these grants.
- II. Procedure Statement: Once a grant is awarded, grant notifications may be received by various departments. All notifications should be given to and processed by the Office of Resource Development (ORD). If grant notifications are received by the Grant Manager, copies of any implementation documents, including the award letter, must be provided to ORD as soon as they are available.
  - A. Securing Grant Agreement: The Grant Manager will submit the agreement to the President for signature. Resource Development will help ensure the progress of the signature process to meet any grantor agency deadlines. In the event a Grant Manager is not yet in place, Resource Development will work with the appropriate college and district offices to ensure grant agreements are implemented, until a Grant Manager is in place.
    1. The Grant Manager will provide copies of the grant award agreement to:
      - a) Vice President of College Services (VPCS)
      - b) Resource Development
      - c) District Grants Accounting
    2. The Grant Manager will send the signed agreement to the funding source:
      - a) The funding source will send to the Grant Manager a copy of the fully executed agreement or an award letter that denotes funding amounts per year, total award amount, and the contract period.
      - b) The Grant Manager will retain this documentation as well as provide copies to the VPCS and Resource Development. Resource Development will provide copies to the Alamo College Foundation and/or District Grants Office as appropriate.
  - B. Grant Set-Up: The Grant Manager will initiate the process of getting a grant set-up in the Alamo Colleges accounting system.
    1. The Grant Manager will complete the Grant Approval Form, the Grants Operational Budget, the Banner Finance-New Client Access Request Form and the Alamo Colleges Foundation Grant Deposit Verification Form. Forms are located online in Alamo Share via the District Grants Accounting Office. The Grant Manager will obtain signatures from the

President; however, Resource Development will assist as needed, including help with locating and completing form templates.

2. The Grant Manager will provide the grant set-up forms, agreement, and award letter to Resource Development for internal review first. Once reviewed, these documents will be submitted to the District Grants Office by Resource Development. Copies of the documents will be kept by Resource Development and the Grant Manager.
3. If stipulated in the grant, copies of the agreement documents will be submitted by Resource Development to the Alamo Colleges Foundation to initiate a payment request for grant funds to be used to create an endowment and/or match grant funds through private/corporate funds.
  - a) Once the Alamo Colleges Foundation receives the endowment portion of the grant funds from the Alamo College Grants Accounting Office, the Foundation will notify the college.
  - b) Once notification is received, the College will then commit matching funds from their resources for the purpose of creating an endowment with accounts set-up at the Alamo College Foundation.

C. External Vendors: If an outside evaluator or other outside vendor is to be hired as a requirement of the proposal, the Grant Manager will work with the VPCS to execute a sub-agreement, sub-award or sub-contract to facilitate reimbursement for their services.

1. All individuals, organizations, and entities that will receive funding must be on the Alamo Colleges Vendor List before payments can be made.
2. If they are not a vendor, then a Vendor Application and a W-9 must be completed and submitted to the Acquisitions Department.

D. Oversight: The Grant Manager will oversee grant implementation

1. Coordinate with the President and appropriate Vice-President to initiate hiring of any project staff;
2. Maintain monthly Time and Efforts reports;
3. Provide monthly status updates to Resource Development and VPCS
4. Upon approval by the VPCS, process significant changes in the grant such as key staff, budget, or project activities; and
5. Submit reports in a timely manner as required by funding agencies. Electronic copies will be submitted to the VPCS and ORD.

Attachment: None

Originator: Patrick Murray

Date Approved: 4/23/19

Last Updated: 5/21/19

Approved: Tangila C. Dove, PhD

Title: Vice President of College Services