## STANDARD OPERATING PROCEDURES
### For Grant Awards
### Request for Proposals/Applications

1. Program office must contact Grants Management and/or Budget designee for funds available to award.

**Approval of Methodology (Methodology Packet, if required)**

2. Program office shall visit the Procurement webpage for Grant Checklist and Forms to complete a Submission form for Proposed or Revised Methodology and a draft solicitation for a Request for Application (RFA) or Proposal (RFP).

   ✓ *(Proceed to step 9 below for solicitation process)*

3. Complete the applicable board item template.

4. Program office shall review the Timeline for Submission for Methodology.

5. Program office shall submit a methodology packet and a draft solicitation to the Office of Procurement for review and approval.

6. The Grant Analyst, Procurement Director, Grants Management Executive Director and the Chief of Operations shall review the methodology packet for board placement.

7. Grant Analyst shall email the program office an Information Request Checklist for revisions, if needed.

8. Upon receipt of revisions from the program office, the Grant Analyst shall review requested revisions and forward the methodology packet to the Procurement Director, Grants Management Executive Director and Chief of Operations to approve for board placement.

**To Release the Request for Proposal or Application**

9. Program office shall review the Timeline for Submission for Grant for possible dates after the methodology is approved by the board.

10. Program office shall complete a Submission Form for the draft RFA/RFP.
    ✓ Chief approves the advertisement

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11. Program office shall complete the Tentative Timeline Checklist.

12. Program office shall complete the RFP/A Template.

13. Program office shall obtain dates from the timeline checklist to complete the advertisement (keep in mind the dates are tentative as Procurement shall revise the document dates according to Procurement's work volume).

14. Program office shall complete an Advertisement letter.

15. Program office shall complete a draft grant.

16. Program office shall complete a rubric or an application.
    - ✓ Mirror evaluation criterion in the RFP.
    - ✓ Mirror eligibility criterion in the RFA

17. Program office shall complete a Facilitator Agreement.

18. Program office shall submit grant packet to the Office of Procurement for review.

19. The Grant Analyst, Procurement Director and Grants Management Executive Director shall review grant packet.

20. Grant Analyst shall email solicitation documents to the program office designee for revisions, if needed.

21. Program office designee makes necessary revisions and returns documents to the Office of Procurement.

22. Grant Analyst shall contact OTSS for advertisement.
    - ✓ Count **30** calendar days after the advertisement date for all solicitations.

23. Program office shall pick up proposals (next day) after proposal/application due date.

24. Program office shall conduct a specifications review (complete Not Evaluated Form).

25. Program office shall review each proposal/application to make certain specifications are met. If the specifications are not met, then the program office must complete the NOT Evaluated Form and submit to the Procurement Director PRIOR to the evaluation for verification and approval of rejection(s).

26. Evaluation team must complete the following forms and evaluate proposal/applications based on criterion:
    - ✓ Evaluator Guidelines
    - ✓ Conflict of Interest Form
    - ✓ Statement of Confidentiality
    - ✓ Evaluator Sign-In
    - ✓ End of Review

27. Program office must complete the following forms:
    - ✓ Complete the Evaluator Score Sheet
    - ✓ Complete the Vendor Score Sheet (tally)

28. Program office shall submit evaluators scores and forms (#26 & #27) to the Office of Procurement for verification and validation of scores.

29. Procurement Director shall validate evaluators scores and return packet to program office.

30. Program office shall complete the following forms for the grant packet:
    - ✓ Justification
    - ✓ Chief approves the amount for grants and SBE item
    - ✓ Grant agreements
    - ✓ Board item, if required
    - ✓ Proposal Budgets
    - ✓ Cover page (verify district information)
    - ✓ Spreadsheet that list the name of grant, number of proposals received, rejected, not awarded and awarded.

31. Program office shall submit the information above (#30) to procurement for review. *(Please refer to the Office of Procurement Timeline for Submission of Grants to meet the deadlines).*

32. Packet shall be reviewed by the Grant Analyst, Procurement Director, and the Grants Management Executive Director for compliance.

33. Grant Analyst shall email the program office an Information Request Checklist for revisions, if needed.

34. Upon receipt of revisions from the program office, the Grant Analyst shall review requested revisions and forward packet to the Procurement Director, and Grants Management Executive Director for signatures.

   ❖ ***(Proceed to step 29 below if Grant Award is $50,000 or more)***

35. Grant Analyst shall email the justification and a request for final signatures to the program office designee.

36. Program office submits final grant agreement with executive signatures to the Procurement Office.

37. Grant Analyst reviews and submits final grant agreement to Procurement Director for review.

38. Procurement Director compares the grant agreement to previously approved grant agreement then signs.

39. Program Office negotiates budgets with grantee.  The budgets should be reviewed to ensure that the narrative lists allowable costs that can be charged to the program.

40. After receiving appropriate revisions to the budgets, the program office  shall sign off on the cover page with the appropriate level signatures.

41. The Program Office shall send a copy of the signed grant agreement and a copy of the revised and signed RFP/A packet back to the grantee.  A letter should accompany this information detailing project codes and reimbursement request instructions.

42. Grantee begins work.

❖ **For SBE Board Item Approvals - ($50,000 and above)**

29. Upon receipt of revisions from the program office, the Grant Analyst shall review requested revisions and forward packet to the Procurement Director, Grants Management Executive Director and Chief of Operations for signature of board approval.

30. The Grant Analyst shall email the Procurement transmittal form to the program office designee and the Superintendent's Office for SBE agenda placement.

31. Program office designee submits item to the Office of the Chief for SBE agenda placement.

32. Grant Analyst places the grant packet in a pending file until SBE approval.

33. Upon SBE approval, the Grant Analyst shall email the program office the justification and a request for final signatures.

34. **NOTIFICATION OF GRANT AWARDS ARE ATTACHED TO GRANT AGREEMENTS AND MAILED TO THE GRANTEE.**

35. Program office submits the final grant agreement with executive signatures to the Procurement office.

36. Grant Analyst submits grant agreement to Procurement Director for review.

37. Procurement Director compares the grant agreement to previously approved grant agreement then signs.

38. Program Office negotiates budgets with grantee. The budgets should be reviewed to ensure that the narrative lists allowable costs that can be charged to the program.

39. After receiving appropriate revisions to the budgets, the program office shall sign off on the cover page with the appropriate level signatures.

40. The Program Office shall send a copy of the signed grant agreement and a copy of the revised and signed RFP/A packet back to the grantee. A letter should accompany this information detailing project codes and reimbursement request instructions.

41. Grantee begins work.