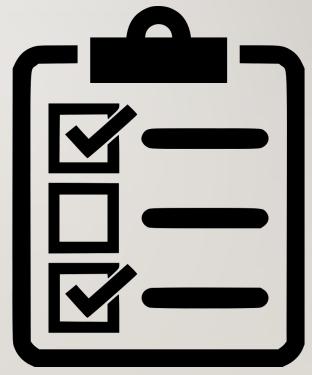# GRANT MANAGERS BROWN BAG

NEW GRANT ACCEPTANCE AND SET-UP PROCESS

SEPTEMBER 2024

WHAT IS CHANGING?

- New Grant Acceptance
  - Process by which we accept grants from the funding source
    - Determine if anything has changed that might affect viability of grant project
    - Decide if we will keep the grant
    - Obtain signature of the President or Chancellor
    - Complete any award Terms and Conditions
- New Grant Set-Up
  - Process by which we input new grant awards in Galaxy
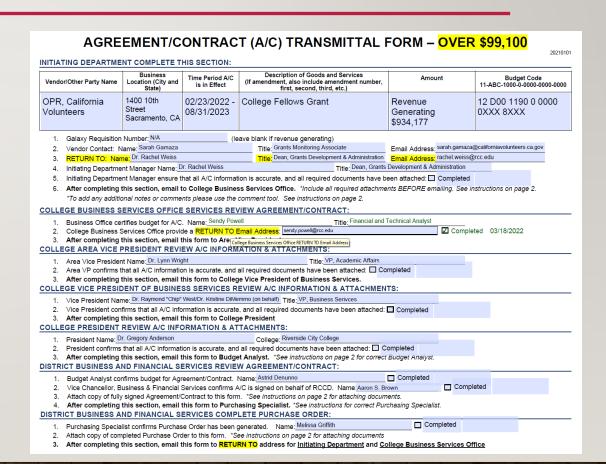
OLD PROCESS

- **Contract Transmittal Form**
  - Project Team would complete the form and attach award documents
  - Form would then be routed through the appropriate approval queue
  - All grant awards requiring signatures would be signed by the Vice Chancellor of Business Services
  - Completed CTF would be routed to Purchasing
  - Purchasing would then return the grant to the Project Team
  - College Business Office would then work with District Business Office to set the grant budget in Galaxy

WHY CHANGE THE OLD PROCESS?

- CTF is designed for vendor contracts
  - Form language does not apply to grants.
  - Purchasing is not an active participant in the grant acceptance.
- CTF was inconsistently applied as it was only used on grants that required a hard signature.
  - None of the federal grants were processed with this form.
- Vice Chancellor for Business Services is not the AOR for most grants, including those at the college.
- CTF routing process could not be monitored
  - On multiple occasions, the form was lost, which delayed the process.

NEW PROCESS - KEY CHANGES

- Process will apply to all revenue generating contracts regardless of the need for signature
  - Grants
  - Subawards
  - State and Federal Appropriations
  - Contracts that generate revenue
  - Others?

NEW PROCESS – KEY CHANGES

- CTF will no longer be used to process new grant awards

  - New form

  - Purpose of the form:

    - Determine next steps

    - Inform College community of grant award

  - A series of Guiding Questions will be utilized to ensure that the appropriate steps are taken

NEW PROCESS – KEY CHANGES

- Separates Grant Acceptance from Grant Set-Up
  - Acceptance is one process
  - Grant Set-up is a second process
  - Important to complete the acceptance tasks in a timely manner
  - Set-up is more involved and may take longer

NEW PROCESS – KEY CHANGES

- Grants Team will initiate the Grant Acceptance and Set-Up Process
  - Acceptance is an extension of the pre-award process
  - Grants Team is in the best position to determine and complete next steps
  - Grants Team will work with Project Teams to successfully transition the grant from pre-award to post-award and the Business Team
  - A warm handoff (to use a student success term)

NEW PROCESS – KEY CHANGES

- All new awards will be signed at the local level unless otherwise requested by funding source
  - Award agreements signed by AOR at the local level
    - At the college level, the AOR is the President and/or their designee
    - At the district level, the Chancellor has designated the AOR function to the Vice Chancellor, Business and Financial Services, unless otherwise requested by the funding source

NEW PROCESS – KEY CHANGES

- All new grants will be included in the Board of Trustees Consent Agenda under Grants/Agreements/Contracts
  - All grants will be reviewed by Board regardless of amount
  - Grants & Sponsored Programs will submit Board agenda items on behalf of the District/Colleges once a fully executed agreement is in place

NEW PROCESS – KEY CHANGES

- Once there is a fully executed agreement, Grant Lead will work with Project Team to complete New Grant Set Up form
  - This will ensure Project Team involvement in the budget development process
  - Project Team will have the opportunity to learn more about and ask questions regarding their new grant
  - Form has been approved by the Business Teams

NEW PROCESS – THREE STEP PROCESS

Step 1 – Accept the Grant

- Person who receives the grant award notice sends it to the Grant Lead

- Grant Lead will determine next steps
  - Address Terms and Conditions
  - Obtain Signature
  - Complete Budget Set-Up Form
  - Respond to Funding Agency
- Grant Lead will send Award Notice and related documents to Grants & Sponsored Programs

Step 1 – New Grant Award Acceptance

Grant acknowledgement and acceptance is a crucial step in the new award process. The process by which grants are accepted depends on the requirements of the funding agency. The District and its colleges must follow the requirements of the funding agency to accept a grant in a timely manner.

Notices of award are generally disseminated to the person who signed the grant application as the Authorized Organizational Representative (AOR) and/or the Project Director.

Upon receipt of a new grant award, the recipient of the notice will immediately forward the information to the Grants Team at the level closest to the award. For example, notices sent to the colleges will be shared with the college Grant Lead, while notices forwarded to the District will be shared with the District Grant Team.

Once the respective Grant Lead receives an award notice, they will determine next steps. These steps may include responding to funding source requirements or questions, informing executive leadership, and/or obtaining the AOR's signature. The steps taken upon receipt of the grant award will depend on award instructions and protocols as set forth by the funding agency.

Using the New Grant Award Acceptance Form, the Grand Lead will process next steps and respond to the funding agency as requested. It should be noted that some grants will not require acceptance, as the funding agency views the submission of a grant as equal to acceptance of the grant.

NEW PROCESS – THREE STEP PROCESS

Step 2 – Send to Board

- Upon receipt of a fully executed contract (both parties have signed and/or accepted) Grants and Sponsored Programs will submit a Board Consent Agenda under Grants/Agreements/Contracts

- GSP will update Grant Entry in Grant Navigator

- Step 2 and 3 may occur together

Step 2 – Board Review and Acceptance

All contracts entered into by the District and its colleges must be reviewed and approved by the Board per Title V requirements.

Upon receipt of a fully executed contract, the responsible Grant Lead will share the new grant award agreement with the District Grants Office. The District Grants Office will then prepare a Board Consent Agenda item under Grants/Contracts/Agreements for the new grant award.

NEW PROCESS – THREE STEP PROCESS

Step 3 – Set Up the Budget

- Upon receipt of a fully executed contract, Grand Lead will meet with Project Team to complete New Grant Set-Up Packet

- Grant Lead and Project Team will complete the first 4 tabs, attaching award agreement, budget, grant application, and other documents to the Packet

- Grant Lead will send Packet to Business Office

- Business Office will complete the fifth tab and send the Packet to BFS

- BFS will send a Resolution to Amend Budget to Board (if necessary) and work with RCOE to set up budget in Galaxy

Step 3 – New Grant Set-Up in Galaxy

All grant funding received by the District must be entered into the District's Financial Management System, Galaxy, before funds can be spent.

Upon receipt of a fully executed contract, the respective Grant Lead will work with the Project Director and other members of the project team to complete the New Grant Set-Up form. The purpose of the New Grant Set-Up form is to provide the District Business and Financial Services Office with the information necessary to set up the grant award in Galaxy.

The Grant Lead and the Project Team will complete the first four tabs of the New Grant Set-Up Form. Specific instructions for completing this form are included with the form. Any questions regarding these tabs should be directed to the District Grants Office.

Once the first four tabs are completed, the Grant Lead will send the New Grant Set-Up Form to the appropriate business office. For grants that are awarded to the colleges, the Grant Lead will share the completed New Grant Set-Up form with the college business office. For grants awarded to the District, the Grants Office will share the New Grant Set-Up form with the District business office.

The respective business office will then complete the fifth tab of the New Grant Set-Up form, entitled Budget for Board Resolution. Once completed, the college business office will send the New Grant Set-Up form and supporting documentation to the District Business and Financial Services (BFS) office. BFS will use this information to present the new funds to the Board of Trustees.

NEW GRANT SET-UP FORM

First 4 Tabs

- Tab 1: Grant Info and Galaxy Approvals
  - Identify if multiple Cost Objectives are required (differentiated by Goal Code)
- Tab 2: Indirect Cost Rate
- Tab 3: Object Codes
  - Assign grant budget to appropriate RCCD object codes
  - Use approved budget
- Tab 4: Salary Calculations

- What is a Cost Objective? (eCFR :: 2 CFR 200.1 -- Definitions.)

Cost objective means a program, function, activity, award, organizational subdivision, contract, or work unit for which cost data are desired and for which provision is made to accumulate and measure the cost of processes, products, jobs, capital projects, etc. associated with that objective.

At RCCD, separate cost objectives are assigned for:
- Direct aid to students (7000 object codes)
- Direct instructional activities
- Program development/student support services

In addition, separate costs objectives can be assigned for:
- Administrative costs
- Subawards
- Other areas that project directors need to track separately

NEW GRANT SET-UP FORM

- **The Fifth Tab**

  - Completed by the Business Office

  - Sent to BFS

  - Used to set-up the budget in Galaxy

  - If a grant is awarded in time to be included in the Tentative or Adopted Budget when it is presented to Board, a separate Resolution to Amend Budget item is not necessary

RIVERSIDE COMMUNITY COLLEGE DISTRICT
INCOME & EXPENDITURES - BUDGET AMENDMENT

Year	County	District	Date	Fund
22	33	07	Board Meeting Date	12

Fund	School	Resource	PY	Goal	Func	Object	Amount	Object Code Description
12		1190	0	0000			1,910	Revenue

EXPENDITURES

Fun	Schoo	Resourc	PY	Goal	Func	Objec	Amt	Object Description
12		1190	0		xxxx	5220	1,400	Travel - Conferences
12		1190	0			1439	500	Acad PT Non-Instructional - Couns, Librarian, Coordinators
12		1190	0			3000	10	Employee Benefits
12		1190	0					
12		1190	0					
12		1190	0					
12		1190	0					
12		1190	0					
12		1190	0					
12		1190	0					

IN SUMMARY

- Impact on Project Directors
  - Send all new Grant Award Agreements, Grant Modifications, and other documents changing the Terms and Conditions to the Grant Lead
  - Work with the Grant Lead to complete Terms and Conditions requirements and New Grant Set-Up document
  - Ask as many questions as necessary

QUESTIONS???

Grant Leads

Moreno Valley College – Alice Musumba

Norco College – Karina Gigliotti

Riverside City College – Rachel Weiss

District Programs (WED, ED Services) – Laurie McQuay-Peninger