
Section 2: Basic Information About BVSD and Grants

A. What Is A Grant?

What's the difference between a "grant" and a "gift?"

A grant includes any financial award from a federal, state or local government agency, or any private foundation, corporation or organization, which is given for specific purposes or to which specific performance requirements attach. Grants are usually solicited through a written proposal or application, and a grant legally transfers money (cash) or other property rights to the recipient organization.

'Gift' is a more generic term. A gift is simply something voluntarily transferred by one person to another, without compensation in return. Although businesses and organizations also make gifts to K-12 education, gifts are more often given by individuals. Gifts may be in the form of cash, stock, real estate, or goods/services (in-kind). Although gifts can be given for specific purposes, you usually don't "apply" for them.

Typical Example:

A. Exemplary High School applies to IBM and receives \$25,000 to upgrade their science lab with new computer equipment. They submit their proposal using IBM's online application system. This would be considered a grant.

B. An IBM representative calls the Exemplary High School principal and asks if they would like to have 25 surplus computer terminals. Although the result might be very similar to (A), this transaction would be considered a gift.

B. What Is BVSD's Basic Policy On Grants?

Boulder Valley School District actively seeks financial support from appropriate government and private grant-makers that will advance the district's Strategic Goals.

BVSD's policies regarding gifts and grants are articulated under Section DD and Section KH of the Board of Education's Policies and Regulations. These are available at the BVSD website under the A-Z reference, subtitle "Policies". Full copies of current relevant policies are included in this notebook.

In General:

Grant funds are used to supplement regular tax-based sources of funding for public schools, not to supplant them. In other words, we use grants to improve and expand basic education, not to fund it.

The district itself applies for grants to fund district-wide or targeted programs, and sometimes for high-needs schools. Each individual school is free to apply for grants on its own, for programs at that school.

The district's grant-seeking is strategic and prioritized. The BVSD Grants Office focuses on grants that can fulfill high-priority district needs/goals; we also look for large grants that will serve many schools/students; and multi-year grants (same logic on effort/benefit); and we concentrate on grants for which BVSD is highly competitive (i.e. has a good chance of actually getting).

Schools are free to set their own priorities for grant-writing, but are encouraged to review their School Improvement Plan and thoughtfully consider how school needs align with grant opportunities.

Board policy requires that all grants to BVSD be approved by the district.

See Section D, below, for procedures to follow.

C. BVSD Review and Approval Procedure For Grants

1. Grants over \$25,000, federal grants, or any grant requiring cash matching funds:

Pre-approval by the district is required.

Inform the district in advance of your intent to submit a grant application using the INTENT TO APPLY form. This is available at the BVSD web site (grants pages). You can also email the Grants Office (see bottom of the page for address) to get a copy.

Do this at least 4 weeks prior to the deadline for the actual application.

The BVSD Educational Programs Leadership Team will review your Intent to Apply and give approval to go ahead. Approval is usually readily granted to projects which fulfill high priorities and which comply with BVSD educational and fiscal policies.

If you are not sure if your project meets this criteria, please contact the Grants Office early in the process.

EXCEPTIONS: If your grant meets the \$25,000/federal/in-kind criteria, but is one that recurs each year without much change in its intents and purposes, please call the Grants Office as you begin to write the grant to determine whether an Intent to Apply is required. (If you have already had this conversation with the Grants Office, you do not need to repeat this step each year unless the nature of your application is going to change significantly.)

2. All Grants:

SUBMIT A FULL COPY of your grant to the district Grants Office.

Do this prior to, or at, the time of submission of the application to the funder. Include an itemized budget. You can send this via the district mail system or via email.

- EXCEPTIONS:
1. Applications to Impact on Education
 2. Grants written by PTA's or other nonprofit organizations on behalf of a school or the district. PTO applications must be submitted.
 3. Applications made by individual teachers or staff for professional development or sabbatical support (i.e. scholarships). Grants for classroom programs are not excepted.

3. District and Board Review:

The Grants Office will read your grant and summarize it on a Grant Approval form. We will call you if there are any questions. The Grant Approval form will be routed in the Ed Center to various departments for approval. Grants over \$25,000, federal grants, or those requiring matching funds also go to the Board of Education. If Board Review is required, the Grants Office fills out the Board Agenda item.

- EXCEPTIONS:
1. Applications to Impact on Education (Classroom mini-grants, Tech 21, STAR grants, etc)
 2. Grants written by PTA's or other nonprofit organizations on behalf of a school or the district.
 3. Grants to individual teachers or staff.

The approval process is handled in a routine manner. It is very rare for the district to 'not approve' a grant, particularly if the Intent to Apply procedure has been followed.

Therefore, you will NOT receive notification following approval of your grant. You will be contacted ONLY if there is a problem or it has not been approved.

4. All Grants Submitted For Review:

Tell us the outcome. If you receive a grant, send a copy of the award letter (sometimes a contract) to the BVSD Grants Office. If you do not get the grant, we still appreciate receiving the information so that we can keep complete files.

E. BVSD Manages The Grant Money

BVSD is the 'fiscal agent' for all grants to schools, departments or the district as a whole. Only BVSD has the legal status to receive grant funds – individual schools do not. BVSD also bears ultimate responsibility for accounting for the

money and fulfilling the terms of the grant. All grants are included in BVSD's annual financial audit.

- EXCEPTIONS:
1. Grants written by PTA's or other nonprofit organizations on behalf of a school or the district. However, if such a grant is used to employ personnel (e.g. a new position, expansion of an existing position, extra-duty pay, overtime, or substitute time) it must be handled by the district to ensure proper payroll deductions and procedures. See Section F below.
 2. Private-sector grants made to charter schools may be managed by the school itself. Grants from governmental entities to charters must be managed by BVSD.

When you receive a check in payment of a grant, forward it to the district Accounting Office with a note, indicating what it is for and your contact information.

If you have followed the review process outlined above, by the time you hear that you have received a grant, the Accounting Department will already have your budget and you will usually be able to start spending funds within days of the award. You may be issued a Pro-Card (district credit card) so that you can easily make purchases. Payment of salaries and benefits under a grant is handled, as usual, by the BVSD payroll office.

To get account codes for grants that have already been approved and awarded, contact Christine Kennedy in the Accounting Department.

Grants are almost always accounted for separately (i.e. not co-mingled with General Fund or school budgets, and not put in the school's Revolving Fund). Grant funds are usually considered "restricted," that is, they can be legally used ONLY for the purposes set forth in the grant application and agreed to by the grant maker. They cannot be absorbed into the district's general budget or taken by another school or department. Grant project managers will receive regular reports from the Accounting Office on the amount of money that has been spent to date from a grant. If you do not use up all of an awarded grant in a timely fashion, the Accounting Office will contact you and develop a plan to expend the funds. As a general rule, BVSD does not like to return un-used grant funds.

F. Are There Any Rules About WHAT We Can Apply For?

Yes, a few.

The provisions of Board Policy KH and KH-R, which cover gifts to the schools, also apply to grants. If your grant will be used to employ personnel, please review this policy carefully before writing or submitting your grant. Consult your level supervisor if in any doubt about how this policy applies to your situation.

Failure to do so can result in the district declining a grant that you have put a lot of work into.

G. Are There Any Rules About WHO We Can Apply To?

Yes, a few.

Board Policy DD states that the opportunity to competitively apply for a grant must be available to all district schools under the same eligibility criteria if a grant is to be used for district personnel. What this means is that schools or departments may not receive grants from privileged sources in order to fund staff positions.

Example: No BVSD elementary schools currently have full-time counselors. You believe one is needed at your school. You happen to mention this to your great aunt Lila, who heads one of the largest foundations in America, which generally does not give money to individual schools. However, in this case, she says she would be delighted to give *your* school a grant to fund the position. NOT ALLOWED. Realistically, other BVSD schools could not compete for Aunt Lila's money on the same basis.

BVSD schools and programs may not accept direct funding from companies engaged in the manufacture and sale of tobacco, alcohol or firearms, Grants from private foundations associated with such companies (i.e. an employee charitable fund, a family foundation) may be acceptable if they are made on a strictly philanthropic (non-self-interested, non-promotional) basis. Grants from organizations seeking to promote a religious or political cause through their grant making are strongly discouraged.

H. About The "Exceptions"

- Applications to IMPACT on EDUCATION are not subject to district review because Impact on Education has its own review process, and the purpose of their grants has already been determined to be consistent with district and community interests.
- Grants that are written on behalf of BVSD schools and programs by outside organizations, school booster clubs, or **PTA's** with their own tax-exempt status are not subject to district review or financial management. (Example 1: Thorne Ecological Institute writes a grant for classroom environmental ed programs. They will receive the grant and manage the program. **NOT SUBJECT TO REVIEW.** Example 2: Hypothetical High School Athletic Boosters has incorporated as a nonprofit organization with tax-exempt status. They receive a grant from the Denver Post for athletic equipment. **NOT SUBJECT TO REVIEW.** But caution: the booster club may not make guarantees regarding the display of promotional items, logos, signage, sponsorship items on school property, facilities or students. Example 3: A group of parents at an elementary school want to build a climbing wall, and apply to the REI Foundation. The PTO makes the application. **SUBJECT TO REVIEW:** PTO's (vs PTA's) do not have separate nonprofit status and must use the district's tax exempt status to shelter the grant application.

I. Authorized Signatures

The Superintendent, Christopher King, Ph.D. and/or the President of the Board of Education (currently Kenneth J. Roberge) are the ONLY authorized officials for grants or contracts that result from grants. Principals and program directors are authorized only to sign for grants of \$2,500 or less. If a grant requires the signature of an authorized official, please submit it in FULL, with an explanatory note or memo, to the Grants Office with at least 48 hours leeway. If the full grant is not available (i.e. you are pushing a deadline), send the signature page only with a memorandum summarizing the purposes and amount of the grant.

Correct names & titles: Christopher King, Ph.D., Superintendent
Kenneth J. Roberge, President

Occasionally a grant requires the name and/or signature of a 'fiscal agent'. In such cases, please use:

Chuck McElwain, Director of Finance and Accounting

J. Support Letters

The Grants Office will assist applicants needing a letter of support from the Superintendent, Board President, or other district official. If you need such a letter to accompany your grant, please contact the Grants Office with at least 3-4 days advance notice. Contact us via email, providing enough information for staff to be clear about who you are and what you need. (Your name, name of school or program; address

information (name of person and organization to whom letter is to be addressed, mailing address) and either a draft text for the letter or a list of points to be made.) Provide a phone number and email address for contact in case there are questions. The signed letter can either be emailed or picked up at the Ed Center.

K. Contracts

If a contract is issued by the grantmaker for a grant over \$2,500, submit the unsigned original(s) to the Superintendent's Office for review and signature. Provided your grant has already been reviewed and approved by the district (see "D" above), processing will be expedient. For smaller grants, the principal or program director may sign provided the grant has already received district approval.

As a general rule: ONLY the Superintendent or Board President are authorized to sign major contracts, memoranda of understanding, or letters of agreement which reflect legal commitments between an outside entity and the school district. A school or district department do not have legal standing to enter into such agreements independently, except as noted above.

K. Intent To Apply

The process insures that the district is aware of – and approves – the purpose, amount and action plan of large grants. Sometimes these grants have legal or fiscal implications that may not be readily apparent to a non-professional grant writer. And in some cases, the district is allowed only one application under a particular program, therefore must insure that there are no conflicts.

If you are planning to write a grant for more than \$25,000, one going to a federal agency, or one that requires cash-matching funds, you must submit an Intent to Apply form to the district grants office. Please submit this at least 4 weeks prior to the grant deadline.

If you do not have complete information at that point, just do your best in filling out the form. The form may be filled out electronically or by hand. It may be emailed, faxed, or mailed to the Grants Office.

If you decide later not to apply, you do not have to do anything. If you decide to postpone your application to a later date, it is probably not necessary to resubmit the Intent to Apply, unless your project has changed significantly.

What happens to the form: The Grants Office reviews it and will contact you if we see any obvious problems or have questions. We will let you know if anyone else in BVSD is planning at application to the same source at the same time. The information on the form will be shared with the Educational Programs Leadership Team (Deputy Superintendent, Assistant Superintendent, District Directors) This ensures that district leadership is aware of it and agrees with its purposes. The Grants Office or a member of EPLT will contact you if there are serious questions or objections to your proposal (rare).

See the next page for an example of the Intent to Apply Form – filled out.