# Grant Life Cycle Flow Chart

# Grant Development (Pre-Award)



# **Identify Need**

# Develop Project Idea

Applications for grants will be made with state, federal, and private agencies when the content of these applications extends the resources available to the District in support of the purposes and strategic plans of the District, its divisions, or departments (AP 3280).

#### Considerations:

- Consistency with our mission and goals
- · Problem/Need/Gap in Service
- · Approach/Methodology
- Outcomes/Impact

Federal, State, Private funding sources (contact IRP&G for more

Find Funding Sources

information).

nding or more

# Review Request for Proposal/

Announcement for requirements and restrictions.

Eligibility Check

#### Considerations:

- Attend grantor information events
- Our limitations are we capable of fulfilling the requirements?
- What are the matching requirements?
- Is there adequate time to apply?
- Is the project feasible?



# → Approval to Proceed

IRP&G will seek VP approval to ensure the grant opportunity supports the mission, goals, and objectives of the District's Strategic Plan (BP 3280).

IRP&G notifies applicants the outcome of this review. If needed, IRP&G will secure a Letter of Intent to Apply from Superintendent/ President, if the RFA requires one.



# **Develop Proposal**

# Establish Grant Project Team

In coordination with IRP&G, form a
Grant Project Team (GPT) and lay
groundwork for proposal. GPT, at
minimum, to include proposed
Project Lead, Grants Manager, Fiscal,
evaluator, and Supervising
Administrator.

#### Considerations:

- Define concept
- Identify necessary partners
- Determine required resources (equipment, space, etc.)
- Data needs
- · Create timeline and assign tasks
- Identify grant writer(s)

# Application Research & Writing

- · Refine concept
- · Gather research/data
- Determine goals/objectives/ outcomes/metrics
- Answer each question in the RFP
- Refer to grantor documents (including scoring rubric if available)
- Consult with stakeholders such as IS, HR, Facilities, etc. as appropriate.
- Gather necessary information from potential sub awardees.

#### Consideration:

 Develop sustainability plan as necessary to integrate grant activities post award

# Budget/Staffing Plan Approval

Identify staffing needs for project implementation and seek approval.

Construct budget in conjunction with Fiscal Services and obtain approval.

#### Considerations:

- Justify staffing through scope of work
- Work with HR for new position classifications
- Anticipate increases in salary
- Account for health & welfare and statutory benefits
- Seek quotes for equipment/supply needs
- Identify travel activities

# Prepare for Submission

Intent to Apply

Complete required Intent to Apply

form (AP 3280) and submit to

IRP&G.

Compile all elements of application and prepare for review and final read (edit and rewrite as necessary):

- Self review
- Peer review
- · HR review (if applicable)
- DEIAA lens crosscheck
- IRP&G Final review, assurance that applications guidelines and requirements have been met.

# Approval to Submit

All new, continuing, or renewing grant applications are reviewed by the appropriate Vice President(s) and require approval of the Superintendent/President prior to submission (BP 3280, AP 3280).

IRP&G will circulate complete proposal for approval by Dir IRP&G, Fiscal Services, applicable VP, and Superintendent/ President. IRP&G to inform Governing Board and Faculty Senate of application for grant funding.

Submit

# **Grant Management (Post-Award)**



### Award Notification

Funding agency will send notification and funding agreement/contract. Any requested modifications will be negotiated with project lead and IRP&G.

# **Board Approval**

All grant awards shall be sent to the Governing Board for review and acceptance (AP 3280).

IRP&G will facilitate approval via the Contract Review and Approval Form for Board approval and acceptance of funds. Upon approval, IRP&G will notify stakeholders and the Public Information officer.

# ■ Grant Start Up

To ensure appropriate staff are assigned to manage and monitor the grant (AP 3280), IRP&G will coordinate a grant launch meeting with the GPT (Evaluator, Fiscal, Grants Manager, Project Lead and supervising administrator).

#### Considerations:

- Include additional stakeholders such as HR, IS, Facilities, etc.
- Establish key roles
- Set up Project # and budget
- Review deliverables and timeline
- Staffing review with HR
- Develop progress report framework
- Sub Award/Contractor agreements

## Training

IRP&G to provide relevant training to project lead and supporting staff.

#### Considerations:

- Project management
- Budget management/tracking
- Grant compliance and allowable costs
- Business Services (i.e., Purchasing) and HR (staff hiring procedures)
- · Record retention
- Best practices

# 4 Execute Project

## Manage Grant

Project Lead to manage and monitor all aspects of grant execution according to grant agreement and District policies. Grant project team to support project lead via regular status updates. IRP&G to work with Project Lead and Funding Agency representative to adjust for unanticipated changes.

# Impact Reporting

The grant project team to work with the project lead to ensure all required reports are completed, reviewed, and submitted according to the timelines established by the sponsor (AP 3280).

#### Considerations:

- Grant Progress Report
- Metric tracking
- Timeline
- Budget review and approval
- Internal progress reports

# Compliance Review

The grant project team to work with the project lead to identify reporting requirements and deadlines.

To assure compliance with funder expectations, IRP&G to receive monthly status updates.

Fiscal Services approves and audits all grant-related activities and expenditures so that they conform to the requirements and allowable costs authorized in the grant. Appropriate fiscal controls are implemented and enforced (AP 3280).

# Project Close-Out

Grant Project Team to support Project Lead in closing out grant and submitting necessary final reports to funding agency. IRP&G to share final report summary with Board.

#### Considerations:

- Timeline for close out reporting
- Final report narrative
- Budget closeout
- Staffing adjustments
- Record retention in accordance with district policy and specific guidelines of funding agency.

# Accessible Text Alternative to the Grant Lifecycle Flowchart

# Grant Development (Pre-Award)

# 1. Identify Need

Recognize gaps in services, strategic priorities, or opportunities that align with the mission and goals of the institution. The goal is to support innovative or expanded programming through external funding.

# 2. Develop Project Idea

Define the proposed concept and assess feasibility. Identify potential partners, data needs, space/equipment requirements, and desired outcomes.

## 3. Find Funding Sources

Explore federal, state, and private funding aligned with the project goals. Review grantor requirements and attend informational events if available.

# 4. Eligibility Check

Assess whether Palomar is eligible to apply under the opportunity, including partnership requirements and applicant type.

# 5. Approval to Proceed

Submit the Intent to Apply Form (per AP 3280) to IRP&G for VP review. IRP&G coordinates the internal review and notifies applicants of approval status.

## 6. Establish Grant Project Team

Coordinate with IRP&G to form a team including Project Lead, Grants Manager, Fiscal, Evaluator, and Supervising Administrator. Assign tasks and set internal deadlines.

## 7. Application Research and Writing

Draft proposal narrative, develop goals, metrics, and sustainability plan. Collect letters of support and required documentation. Coordinate reviews with IRP&G, HR, and stakeholders.

# 8. Budget and Staffing Plan Approval

Work with Fiscal to build the budget. Ensure proposed staffing aligns with HR classifications and obtain necessary approvals for implementation roles.

#### 9. Approval to Submit

IRP&G routes final proposal and budget for formal review and sign-off by IRP&G Director, Fiscal, VP, and Superintendent/President. Governing Board and Faculty Senate are notified as required.

## 10. Submit Application

IRP&G submits the application through the required submission portal or provides support for submission by the applicant.

# **Grant Management (Post-Award)**

#### 1. Receive Award

Funding agency issues an award notification. IRP&G negotiates any necessary changes with the funding agency and coordinates Board approval.

# 2. Grant Start-Up

IRP&G coordinates a launch meeting with the grant project team. Responsibilities, deliverables, budget, and reporting requirements are reviewed. Project number is assigned.

## 3. Training

IRP&G provides onboarding for Project Leads and staff. Topics include allowable costs, compliance, reporting, HR processes, and documentation best practices.

# 4. Manage Grant

Project Lead executes activities in alignment with the approved scope and budget. IRP&G and Fiscal support implementation through updates, approvals, and compliance monitoring.

## 5. Impact Reporting and Compliance Review

The project team monitors progress and meets reporting requirements. IRP&G compiles outcomes and shares final results. Fiscal ensures all expenditures comply with regulations.

# 6. Project Closeout

The Project Lead and team complete final reports, review expenditures, close out personnel assignments, and ensure records are retained. IRP&G submits summaries to the Board and funder.