**GRANT STANDARD OPERATING PROCEDURES**

For procuring grants for services resulting from a Request for Proposal or Application (RFP/A), Program Offices shall plan far in advance to ensure timely processing of a grant to begin services.

**T****he program office is responsible for completing the following tasks:**

* Contact Grants Management and/or program budget designee for availability of funds.
* Identify and develop the program scope of work, eligibility and deliverables for services required.
* Visit the Procurement webpage for Grants Checklist and Forms to locate appropriate grant forms to request SBE approval of a Methodology and review of the solicitation:

**METHODOLOGY**

* + - * **Submission Form** - Methodology
  + **Timeline for Submission of Grants –** review *Methodology*
    - * **SBE Board Item**
* Select the appropriate **solicitation** template for an **RFP/A** to begin development of the packet.
* *Request for Applications (RFA)* 
  + Meet eligibility and complete application – *Formula*
* *Request for Proposal (RFP)*
* Project Plan of Action and Budget - *Competitive and Discretionary*
* Retrieve the following documents to develop a procurement packet:
  + **Timeline for Submission of Grants**
  + **Tentative Timeline Checklist**
  + **RFP/A template**
  + **Facilitator Agreement**
  + **Grant agreement** - review scope of work, end date, renewal clauses, etc.
  + **Rubric**
  + **Submission Form** - for a Grant
* Review the Timeline for Submission of Grants document and pay close attention to the Important Notes.
* Identify date and/or board approval required to award a subgrantee for required services.
* Contact the Grants Management Executive Director or designee for assistance in the development of the Methodology, if needed.

**SOLICITATION**

* Contact the Procurement Director or designee to schedule a procurement consultation to assist with the development of the solicitation **PRIOR** to completion. *The draft solicitation shall include, at the minimum, the scope of work, contractor requirements and selection criterion.*
  + Obtain and complete the Tentative Timeline Checklist - *a calendar is required to assist with the development.*
* Mirror and align dates from the Tentative Timeline Checklist to complete dates in the solicitation - *keep in mind dates should be far in advance to prevent date revisions to the solicitation upon the procurement and compliance reviews.*
  + Finalize the solicitation in accordance with procurement’s consultation/compliance guidelines and the Tentative Timeline Checklist
  + Complete a draft grant, rubric, and the Facilitator Agreement.
  + Obtain signatures on required Submission Form and submit a packet to the procurement office via email to [grantsandcontracts@mdek12.org](mailto:grantsandcontracts@mdek12.org) , in accordance with the procurement guidelines and portal procedures.

**The Office of Procurement’s review process steps for the solicitation packet is as follows:**

* + The Office Director secures the packet from the designated email, log the packet, and assigns the packet to a grant analyst.
  + The Assigned Grant Analyst (AGA) shall review the Methodology and solicitation.

**STATE BOARD OF EDUCATION (SBE) APPROVAL FOR METHODOLOGY**

* + The Procurement Director and Grants Management Executive Director reviews the Methodology to submit to the Chief of Operations (COO) to review and approve for SBE agenda placement.
  + The COO has the FINAL approval for **all** SBE board agenda placement requests.
  + The Procurement Director will notify the program office of an approval or disapproval.
  + The COO designee will notify the applicable Chief’s Officer designee and the Office of the Superintendent of an approval **on or before** the date line items are due.
  + Any request submitted **AFTER** the date line items are due will be placed on the next month’s agenda.

**SOLICITATION REVIEW**

* + The AGA shall review the packet and email the program office if the packet is incomplete for processing. *The review process timeline BEGINS when a complete packet is submitted in accordance with procurement guidelines.*
  + Program office designee completes the packet and return completed packet to the AGA for processing.
  + AGA forwards the packet to secondary and compliance for review.
  + Upon the compliance review the AGA returns packet to the program office contact to finalize packet.
  + AGA shall prepare the solicitation for advertisement **after** SBE approval of the Methodology.

**ADVERTISEMENT OF SOLICITATION**

* + AGA shall contact OTSS and newspaper for advertising the applicable solicitation. The solicitation shall be advertised in accordance with the number of days required by the MDE.
  + Program office contact is responsible for reviewing and compiling the public’s questions, providing the questions and answers on the Acknowledgment of Amendments Form, and submitting the form to the AGA timely. The AGA must request OTSS to post the form on the MDE webpage **a day before** **the due date** specified in the solicitation.

**SOLICITATION AMENDMENTS OR READVERTISEMENTS,** if applicable

* + Promptly contact the AGA.
  + Email/Mail notice to all applicants who responded to the solicitation.
  + Repeat solicitation steps above, if applicable.

**SOLICITATION TERMINATION,** if applicable

* + Promptly contact the AGA.
  + Email/Mail notice to all applicants who responded to the solicitation.
  + Repeat solicitation steps above, if applicable.

**RECIEPT OF RESPONSES**

* + On the due date or soon thereafter, the AGA and program office shall coordinate to verify and initial the registry of responses to ensure ALL submissions are accounted for.
  + The program office shall retain a copy of the registry and all responses received for their file.

**EVALUATION PROCESS –** The evaluation team shall be comprised of experts in the field of service specified in the solicitation and majority of reviewers must be external of the program office .

**Collaborations of the procurement and program office shall include:**

**The program office shall conduct a specifications review of each response submitted to include:**

* + Make certain eligibility requirements listed in the solicitation are met. If specifications are not met, then the program office must reject the response.
  + Complete the Proposal/Application Not Evaluated Form - *Include the solicitation’s page number(s) and copy and paste the requirement(s) that were not met on the form.*
  + Submit the signed Not Evaluated Form and responses rejected to the Procurement Director **PRIOR** to the evaluation for verification and approval of rejection(s).
  + Contact AGA and evaluation team to schedule dates that are accommodating for everyone to complete evaluation processes.
  + Upon day of evaluation, the evaluation team must complete the following forms and evaluate based on criterion:
* Evaluation Plan and Procedures – Evaluation process guidance
* Conflict of Interest Form
* Confidentiality Form
* Statement of Confidentiality
* Evaluator Sign-In
* Solicitation
* Rubric
* End of Review Form
  + Follow and provide guidance as specified in the Evaluation Plan and Procedures document.
  + After the evaluation, complete:
    - The score sheet (tally),
    - Award and Non-Awards Letters
  + Submit rubrics, tally sheet, and letters to the AGA for verification and validation of scores.

**GRANT AWARD(S) & NON-AWARD(S) –** This process is completed after an applicant(s) has been identified through the evaluation process and now an agreement is required PRIOR to services beginning.

**The program office is responsible for the completing the tasks:** *Please refer to the Office of Procurement Timeline for Submission of Grants to assist with establishing a timeframe to begin services.*

**GRANT PACKET**

* + Complete forms below, found on the Grants Checklist and Forms webpage, to develop the **awarded grants** and packet for submission via the [grantsandcontract@mdek12.org](mailto:grantsandcontract@mdek12.org):
    - **a list of grantors ranked highest to lowest,**
    - **a list to detail the number responses received, rejected (reason), evaluated, awarded, and not awarded,**
    - **Justification Form signed by the Chief Officer to approves the amount of the grant(s),**
    - **SBE Board Item, if required**
    - **Applicant budgets**

**The Office of Procurement’s review process steps for the grant packet(s) is as follows:**

* + The Office Director secures the packet from the designated email and assigns the packet to the same grant analyst processing the solicitation.
  + The Assigned Grant Analyst (AGA) shall review the grant packet and email the program office if the packet is incomplete for processing. *The review process timeline BEGINS when a complete packet is submitted in accordance with procurement guidelines.*
  + Program office designee complete the packet and return completed packet to the AGA for processing.
  + AGA forwards the packet to secondary and compliance for review.
  + Upon the compliance review, the AGA returns packet to the program office contact to finalize the packet.
  + If grants are revised in accordance with the findings from the procurement and compliance review and are **less than** $50,000, the AGA shall notify the program office via email to obtain final signatures.

***SBE PROCESSES: ($50,000 and above)***

* + The Procurement Director prepares the grant packet to submit to the Chief of Operations (COO) for a review and approval for SBE agenda placement.
  + The COO has the FINAL approval for **all** SBE board agenda placement requests.
  + The Procurement Director will forward approval or disapproval notice to the program office.
  + The COO designee will forward approval notice to the applicable Chief’s Officer designee and the Office of the Superintendent **on or before** to the date line items are due.
  + Any request submitted **AFTER** the date line items are due will be placed on next month’s agenda.
  + AGA shall hold the grant packet in pending status until the applicable SBE approval.
  + Upon approval, the AGA shall notify the program office via email to obtain final signatures.
  + Complete and distribute award and non-award letters to each applicant responding to the solicitation. *Include the solicitation’s page number(s) and copy and paste the requirement(s) that were not met in the letter for non-awards.*

**FINAL SIGNATURES**

**The program office is responsible for:**

* + Emailing a PDF copy of the procurement approved grant to the vendor to obtain signature.
  + Mirror signed agreement to the procurement approved grant.
  + Attach Justification Form and request and obtain the Chief Officer’s signature.
  + Email the signed grant to the AGA to obtain the Procurement Director’s signature.
  + Contact the vendor to begin work upon receiving the signed grant.

**GRANT MAINTENANCE**

* Monitor and manage deliverables as required.
* Review, approve, and submit reimbursements to the accounting office.
* Manage work performance to complete a performance based evaluation as required on all contracts.
* Submit renewal contract(s) in accordance with the Timeline of Submission of Grants, if applicable.

**GRANT MODIFICATIONS**

* + Program shall complete forms below, found on the Grant Checklist and Forms webpage, to develop the grant modification packet for submission via the [grantsandcontract@mdek12.org](mailto:grantsandcontract@mdek12.org):
    - Justification Form
    - Modification Grant
    - Justification memo to support amendment reason and attach:
      * Previous grant signed

For procurement questions or inquiries, please contact the assigned grant analyst directly.