



Employee Policies and Procedures

Title: External Grant Application Policy

Document Number – FIN 1.02

I. Purpose

To establish and communicate policies, procedures and guidelines to ensure that the administration of all grants awarded to the Town of Jupiter (Town) meet established standardized guidelines and regulations, and comply with all program requirements.

II. Definitions

None applicable

III. Scope

This policy applies to all departments and employees participating in the process of obtaining or administrating grant funding received by the Town from other agencies.

IV. Policy

All Town employees involved in the administration and/or coordination of grants in any form, including but not limited to application, budgetary administration, compliance and/or financial reporting, or the dispensing of grant proceeds shall follow the procedures set forth in this policy.

V. Procedure

Roles & Responsibilities

The grant application and approval process is defined as Attachment 1 to this Policy. The Town Department applying for the grant will be responsible for following the steps of the process and ensuring approvals and documentation are obtained. The Finance Department will be responsible for maintaining grant documentation for the Town in a central file, and will work directly with the applying department(s) to ensure that financial controls and any applicable regulations are met.

Grant Application Approval Form

A Grant Application Approval form (the form) must be approved by the department head and Town Manager prior to submitting any grant application. For each grant application made, the form will include a brief description of the project, name of the awarding agency, amount of the grant, Town contact person, key dates for the application and approval process, required matches, and any other pertinent information/limitations regarding the



use of grant funds. The approved form will be maintained in a central location by the Finance Department.

Notification

Following the process shown in Attachment 1, the Finance Department will receive notification of any grant approval forms or pending grant applications by the department that is seeking the grant.

Prior to a grant application being placed on Town Council agenda, the Finance Department shall receive electronic notification, including a copy of the complete grant application packet. In the event the application contains 'security-sensitive' information of a confidential nature, a hardcopy of the application may be routed to the Finance Department via inter-office mail in lieu of electronic submission.

Administration

If the grant agreement is approved by Council, the submitting department shall notify the Finance Department. The initiating department director shall be responsible for ensuring that the project progresses according to the grant time schedule, and for administering all aspects of the grant progress, including the completion of any necessary progress reports, in communication and collaboration with the Finance Department.

The Finance Department shall receive copies of all grant related information, including contracts, amendments, extension requests, site-visit notifications and any other communications. The Finance Department shall assist in the preparation, review and verification of all grant related payment requests, financial statements and related documentation. Copies of any required reports, including but not limited to progress and annual reports shall also be provided, except in those instances when the reports are impractical to copy, then access shall be made available upon request.

Purchasing and Procurement

Any purchase or procurement accomplished with grant funding shall be made in accordance with the Town's established Purchasing Policy, unless directed differently by the grant agreement or the agency from which the grant was obtained. Any known contradictions between the Town's purchasing policy and the grant agreement must be researched prior to submitting a Grant Application Approval form or applying for the grant. In the event of conflicting purchasing requirements, the grant requirements will supersede the Town purchasing procedures. The use of suspended or debarred vendors from federally funded grants is strictly prohibited.

Budgetary Considerations

Prior to submitting the grant application, the Finance Director or designee shall verify that sufficient funds exist in the budget to meet any matching fund requirements.



Further, no matching funding shall be encumbered and/or spent prior to Town Council approval of and Grant Agency award of the matching grant.

Receipt of Award

Upon receipt of the executed grant award document, the submitting department director or designee shall promptly review the grant agreement to ensure that the award information is correct. The department shall retain a copy of the agreement in the departmental files, forward a copy of the grant to the Finance Department, and forward the original executed document to the Town Clerk's Office for storage and retention. The Finance Department shall establish and/or assign appropriate account numbers for grant proceeds and disbursements. The Finance Department shall be notified of any requested grant funding advances.

Compliance

Any department receiving a grant award shall be responsible for administering the funds within the budgetary and time constraints specified in the grant agreement, requesting budget modifications or time extensions, and monitoring for compliance with rules and regulations, which may include the Davis-Bacon Act, Drug Free Work Place Act and Federal requirements regarding debarred vendors. Both the department director or designee, and the Finance Department may act as liaisons between a granting agency and the Town.

Finance Department Responsibilities

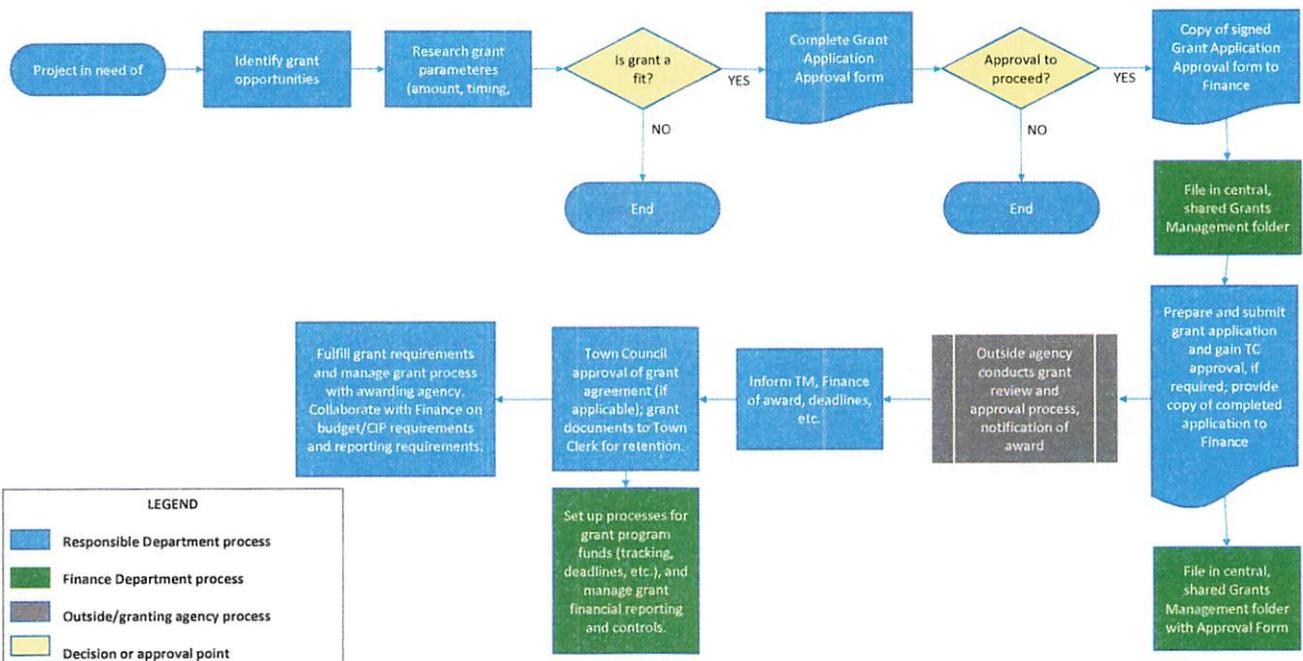
The Finance Department shall assist departments to ensure reimbursement and/or funding requests are timely, and that necessary financial reports are filed with the granting agency within established deadlines. The Finance Department shall further assist departments to manage financial and budgetary aspects of grant activities, ensure compliance with established policies, procedures and regulations related to grant administration, and maintain adequate records to document allowable costs and revenues attributable to each grant project.

All grant funds received by the Town shall be immediately forwarded to the Finance Department for processing and recording in accordance with the Town's established accounting practices.

The Finance Department shall maintain grant master files, financial and program records in accordance with the retention terms specified in the grant agreements. All completed grant records shall be disposed of pursuant to established guidelines as set forth in OMB Circular A-102 and Chapter 119 of the Florida Statutes.



Town of Jupiter Grant Approval and Application Process





External Grant Application Approval Form

Grant Program Name: _____

Grant Program Agency & Contact Information: _____

Anticipated Grant Amount: _____

TOJ Department & Staff Lead: _____

Type of Grant Funding:

Matching Reimbursement Other _____

TOJ CIP or program grant will help to fund (use exact title of CIP page, project # and account #):

Overview of grant requirements:

Please insert a summary of the criteria, what is needed to be successful in obtaining the grant, and key milestones and deadlines.

Grant management process:

Please include a summary of what the agency will need from us throughout the grant and what staff will be required to manage and execute the requirements of the grant.

Other support required:

Please include a summary of any required partners, support from other agencies, departments, etc.

Approvals:

Department Director

Finance Director

Town Manager

(Sign & Print Name)

Scott Reynolds

Frank J. Kitzerow

Date

Date

Date

Reviewed By: Mark Rady _____