
From: Cherylyn Crill-Hornsby
Sent: Monday, August 13, 2012 12:22 PM
To: Janell Mendoza; Donna Berry; Lorrie Hopper; Julie Preston-Smith; Shanna Ahrens; Peg Mericle; Jim Chin; Kelly Fowler
Cc: Ed Eng; Cheryl Sullivan; Shelly Conner
Subject: Grant Process Update: Campus Presidents Selection of Committee Members

Good Afternoon,

As a reminder, we are confirming that you have had a chance to speak with your campus presidents regarding the names of three individuals who they would like to include in the Competitive Grant Process Review task force.

We hope to have these names to Shelly Conner by COB on Wednesday, August 15th.

If you have not yet had a chance to confirm participant selection for your campus at this time, please let us know when you feel you will have this information.

From our meeting minutes of Friday, July 27th:

Timeline:

- 1) Campus presidents recommend three (3) people per campus/center for taskforce
 - a. Recommended members include: F&I officers (including division level accounting staff with grants experience), Instructional staff familiar with grants applications (end users)
 - b. Each campus group to work with internal campus constituents to identify current campus review procedures for applications for competitive grants
- 2) Shelly Conner to send review materials to taskforce members for their consideration
 - a. Shelly Conner to establish an information distribution point (such as Blackboard site) for housing materials
 - b. Materials to include all campus and DO current application review procedures for competitive grants
- 3) Taskforce to begin meetings no later than the beginning of September, 2012
- 4) Taskforce to conclude meetings and codify recommendations no later than end of December, 2012
- 5) Taskforce to report out to Chancellor's Cabinet

Thank you!

Yours,

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STATE CENTER COMMUNITY
COLLEGE DISTRICT

Grant Process Task Force Meeting

11:00 a.m. – 12:00 p.m. DO Conference Room/RC PCR/WI AC2-149B

Notes from Meeting of October 10, 2012

Present: Shanna Ahrens, Glynn Billings, Cindy Chang, Jim Chin, Shelly Conner, Cherylyn Crill-Hornsby, Melanie Highfill, Lorrie Hopper, Erica Johnson, Helena Kennedy, Alicia Rios, Wil Schofield

Guest: Tabitha Villalba

The meeting was called to order at 11:02 a.m. by S. Conner.

I. Welcome and Introductions
See listed individuals above.

II. Purpose and charge of the task force

The Grant Process Task Force was not created via any formal process. The group was formed in response to: 1) Questions from the Chancellor's Cabinet and Communication Council; 2) Program review goal to regularly evaluate the Grant Department process in order to improve application work-flow.

Initial meeting to form the Task Force was held with the finance and administration team. Vice Chancellor, Ed Eng, recommended that a group be formed to explore this issue. The campus presidents were asked to select three members to represent each of their campuses, with a mix of financial and grant-end-users being suggested. Overall grant application process to be reviewed with final recommendations to be submitted to the Chancellor's Cabinet.

Initial timeline for Grant Process Task Force completion to be updated in order to include incoming Vice Chancellor, Ed Services; Dr. George Railey (start date, November, 2012) with a project end date in Spring, 2013 (March, 2013).

III. Progress to date

Suggestions from the campus presidents were received; candidates were contacted; meeting date/time/location arranged; initial meeting materials distributed.

IV. Development of an ongoing schedule

It was proposed and agreed that the Grant Process Task Force will meet on the 2nd and 4th Wednesdays of each month from 11:00 AM – 12:00 PM. *The meeting locations have been arranged, and are as follows: DO Conference Room /WI AC2 – 149B / RC CCI-208.*

V. Review of existing district and campus grant processes

A. FCC

Process begins with initiator speaking to Dean > proposal is forwarded to Vice President for review/approval > budget (but not narrative) is forwarded to campus business office for review/approval > campus business office forwards budget to DO accounting department for review/approval > once DO accounting signs off, routing-slip form initiated by grant seeker > routing slip and grant materials (budget/narrative) sent to campus offices that must review > campus offices sign off and return to campus business office > signed copy of routing slip sent electronically to grant department

B. RC(& NC)

Process begins with initiator speaking to Dean and/or Vice President for review/approval > project proposal is discussed with campus business office and project budget is developed > campus business office forwards budget to DO accounting department for review/approval > once DO accounting signs off, routing-slip form initiated by grant seeker > routing slip and grant materials (budget/narrative) sent to campus offices that must review > campus offices sign off and return to campus business office > signed copy of routing slip sent electronically to grant department

C. WI

Process begins with initiator speaking to Dean and/or Vice President for review/approval > work on the narrative and budget for the project begins > budget forwarded to campus business office for review/approval > campus business office forwards budget to DO accounting department for review/approval > once DO accounting signs off, initiator speaks with WI president to receive approval for final submittal of the grant > NOI form is submitted > routing-slip form initiated by grant seeker > routing slip and grant materials (budget/narrative) sent to campus offices that must review > signed copy of routing slip sent electronically to grant department

*Notes: Review of the potential grant to ensure that it is in alignment with the Strategic Plan is not always documented. The size of the campuses involved has an effect on the workflow and perhaps leads to different processes at each location. Timing of the NOI submittal may negatively impact this documents communication function for DO and campus

D. Districtwide Processes

Materials provided as part of meeting packet include AR 3280 and the formal 'district level' process for grant submittal.

For all locations, the NOI form is submitted via the district's intranet site. The NOI serves three functions: 1) To facilitate potential collaboration both on and between campuses on grant projects; 2) To inform DO and campuses of the maximum funding amount, deadline, match, space and personnel needs of the project; 3) To offer an opportunity for campuses to have input on grant application decision. The campus president approves or declines the NOI form. If the NOI form is not approved, the initiator receives a notice informing him or her to contact the campus president for additional instructions.

Proposal Development:

The grant department 1) distributes timeline and grant process information to initiator and campus business office; 2) distributes template documents based on funding agency RFA to initiator and campus business office; and 3) sends periodic reminders sent to campus regarding timeline. The initiator prepares the narrative and budget; the grants department provides edit/development services and research as needed.

Proposal Approval and Submittal:

The grants department completes/reviews final application forms and enters approved budget into the correct format. The campus initiator routes the draft proposal to campus department/business offices as needed for approval. The signed approval form is sent to the grant department; it is attached to the approved budget, narrative documents, and application forms and forwarded to Vice Chancellor, Finance & Administration offices for final review/approval/signature. Once the routing slip is completed at DO, the grant department submits the proposal to the funding agency (electronic or hardcopy submittal), tracks submittal to ensure its timely arrival, and distributes copies of submitted grant documents to DO accounting, initiator, and campus business office.

*Notes: How can we make the NOI process work better? Are the current timelines developed in response to AR 3280 workable? Do these timelines allow for enough review at the campus presidents and Vice Chancellor, Finance & Administration offices?

VI. Next Steps

The next meeting will include a review of the NOI process with input gathered from campus constituencies by Grant Process Task Force members from those locations. How can this practice be improved to better serve the grant application process?

There will also be a discussion of how to ensure that grants are aligned with strategic/educational master plans.

Meeting adjourned at 12:06 pm

Respectfully submitted,

Cherylyn Crill-Hornsby

Future Agenda Items:

1. NOI Process
2. Final Approval Timelines
 - a. Timing of Routing Slip via Campus Presidents & VC Finance and Administration
3. Summary sheet of narrative grant information/project for faster review

Next meeting October 24th, 2012

NOTE: Assignments are underlined