Grant Approval Form: Approver Job Aid

The Office of Grant Development coordinates the district's grant application process and philanthropic outreach aligned with the district's Strategic Plan. All grant applications, regardless of the value, should be approved internally before being submitted to the funder.

Grant Approval Form Process

☐ To initiate a grant approval form, applicants will go to the Office of Grant Development's website (from the district's homepage, www.fultonschools.org, click 'Department' on the green bar, and select 'Grant Development').

☐ Next, the applicant will click on 'Launch Form' in the 'New Request' box to start the grant approval form.

☐ The applicant should complete the online Grant Approval Form at least one week prior to the grant deadline.

☐ The grant approval form will dynamically generate the appropriate approval levels based on the value of the grant.

☐ Approval levels for school-based grants:
  o Grant applications valued less than $5K, the principal must approve.
  o Grant applications valued from $5K up to $50K, the principal, zone superintendent, grant development, and chief financial officer must approve.
  o Grant applications valued $50K or more, the principal, zone superintendent, grant development, chief financial officer, cabinet member, and superintendent must approve.

☐ Approval levels for department-based grants:
  o Grant applications valued less than $5K, the approval email will be routed to the department director whose name was entered on the 'Grant Type' tab of the grant approval form.
  o Grant applications valued from $5K up to $50K, the departmental director, grant development, and chief financial officer must approve.
  o Grant applications valued $50K or more, the departmental director, grant development, chief financial officer, cabinet member, and superintendent must approve.

☐ If a grant includes funding for a contractor or a staff position, the chief talent officer also must approve.

Grant Approval Form: Approver Job Aid

Approving a Grant

☐ Once an applicant submits a grant approval form, the first approver will receive an automated email from Microsoft Flow. This dynamic approval email uses Power Automate technology.

☐ An example of an approval email for a $55K school-based grant to expand the SAFE Center is shown below. In this example, the principal of Banneker will receive the first approval email. To review details of the grant application, the principal can click on the Grant ID link. A new browser window will open showing the grant approval form.

Grant Approval Form - Action Required: School Gra...

Requested by **Shiflett, Cole** <shiflettc@fultonschools.org>

Date Created Tuesday, May 25, 2021 2:43 PM
Link   Grant ID GRT-15720210525

Will REPLACE approver with Principal: StamperJ@fultonschools.org
The Office of Grant Development is requesting your approval on this grant. To review additional information, click on the Grant ID link above.
Grant Title: SAFE Center Expansion
Grant Amount: $ 55000
Grant Deadline: 2021-06-25
Grant Purpose: This grant will provide funding to create a blue print to expand the SAFE Center to other schools.
Organization: United Way of Metro Atlanta
Submitted By: Hopkins, Kelly

Contact the Office of Grant Development if you have any questions regarding the approval of this grant application.

| Approve | Decline |

☐ If the principal clicks on the Grant ID link, he/she can click on Tab 3 to open any supporting documents that the applicant has uploaded; see screen shot below.

| ① Grant Type | ② Grant Details | ③ **Supporting Documents** | ④ Workflow History |

Attach grant narrative, grant budget, etc., to support the review and approval of this request

📄 Banneker SAFE Center Expansion.pdf

📄 Banneker Safe Center Budget Form.pdf

| Previous | | Next |

☐ If the principal is familiar with the grant application, he/she can simply click the 'Approve' or 'Decline' button on the Microsoft Flow email and add comments without having to access the actual grant approval form. Next, the principal will click 'Submit'.

Grant Title: SAFE Center Expansion
Grant Amount: $ 55000
Grant Deadline: 2021-06-25
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Organization: United Way of Metro Atlanta
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Contact the Office of Grant Development if you have any questions regarding the approval of this grant application.

Approve   Decline

Comments

This is a great opportunity to share the success of the SAFE Center with other schools.

Submit

☐ After the principal clicks 'Submit', the email dynamically updates to reflect the action taken. In the example below the principal approved the grant for the SAFE Center.

Approvals | Power Automate

Approved

Date Submitted: Wednesday, May 26, 2021 11:43 AM
Comments   This is a great opportunity to share the success of the SAFE Center with other schools.

Get the Power Automate app to receive push notifications and grant approvals from anywhere. Learn more. This message was created by a flow in Power Automate. Do not reply. Microsoft Corporation 2020.

☐ Based on logic built into the grant approval form, the next approver will receive the Microsoft Flow automated approval email. Once all approvers have approved the grant application, the applicant receives a confirmation email advising him/her to complete the grant application according to guidelines provided by the funder and submit it by the grant deadline. If any of the approvers 'Decline' the form, the process stops, and the applicant is notified.

☐ If an approver has not taken action on a Grant Approval Form after two-days, he/she will receive an email reminder. The approver will receive a second reminder after four-days. The approver should locate the original Microsoft Flow email to 'Approve' or 'Decline' the grant application. If the approver cannot locate the original email, the reminder email will have a link to the Power Automate Approval site, which will list all of the pending approvals.

Signing a Document for a Grant Application

If a grant application requires a document with an original signature, the file can be downloaded from Tab 3, printed, and the appropriate official can manually or digitally sign the document.

In the Banneker example, the SAFE Center budget form needs to be signed by the principal. The principal or his designee will perform the following steps to sign and upload the budget form.

- From the Microsoft Flow approval email that the principal received, the principal will click on the Grant ID link. The principal can forward the approval email to his/her bookkeeper to click on the Grant ID link and complete the steps to print, scan and upload the signed budget form. However, the bookkeeper cannot 'Approve' the grant from a Microsoft Flow email that was forwarded. The principal must approve from his/her email account.
- Click on Tab 3 to see the attachments. From Tab 3, click on the budget form and print it.
- The principal signs the budget form. If a form requires a digital signature, the same steps apply.
- Scan the signed budget form.
- Return to the grant approval form and click on 'Edit' in the bar above the form.

- The screen automatically moves back to Tab 1. Next, click on Tab 2, and then click on Tab 3.
- From Tab 3, click on the 'Select Files' button.

- Select the signed budget form file from your computer and upload it to Tab 3. Click 'Next' and then 'Submit'. The screen returns to the main landing page.
- The signed budget form is now saved to Tab 3; see screen shot below.

- Once the signed form is uploaded, the principal must return to her/his Microsoft Flow approval email and click 'Approve'. The principal can add comments that the budget has been signed and uploaded to the grant approval form. After the principal clicks 'Submit', the form will proceed to the next approver.
- Once the grant is fully approved, the applicant can go to Tab 3 to download the signed form and submit it to the funder.
- The Office of Grant Development can assist if any documents require original signatures.

## Approving or Reassigning a Grant via Power Automate

- If an approver takes no action on the approval email, the process is halted. The approver will receive up to two reminder emails to take action. If the Microsoft Flow approval email cannot be located,

the approver can access the FCS Grant Tracking Site and click on 'Open Approvals Site' in the 'My Approvals' box. This site will only show pending grant approvals.
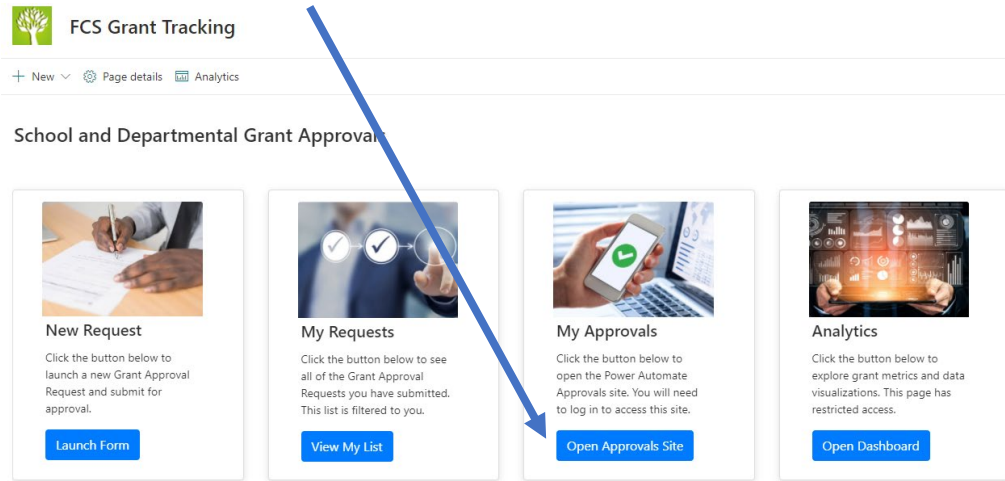

☐ The approver may need to login using his/her FCS login credentials to view the pending forms on the Power Automate platform. There may be a lag the first time the approver logs in as the system configures the view.

☐ The approver will click on the hyperlink of the approval request. A 'Respond' box will open on the right-hand side of the screen that duplicates the information that was provided in the original approval email from Microsoft Flow.

☐ To review details about the grant, the approver can click on the Grant ID hyperlink in the Overview box. It will open a new window, where the approver can review the various tabs of the form. The approver will need to return to the Power Automate platform to take action.

☐ Next, the approver will next scroll down to the 'Choose Your Response' field and click on 'Approve' or 'Decline'. The approver can add comments and then click 'Confirm' (see screen shot below). The approver can then click 'Done' and exit the Power Automate platform. Note: accessing the Power Automate platform is *only* necessary if the original approval email cannot be located.
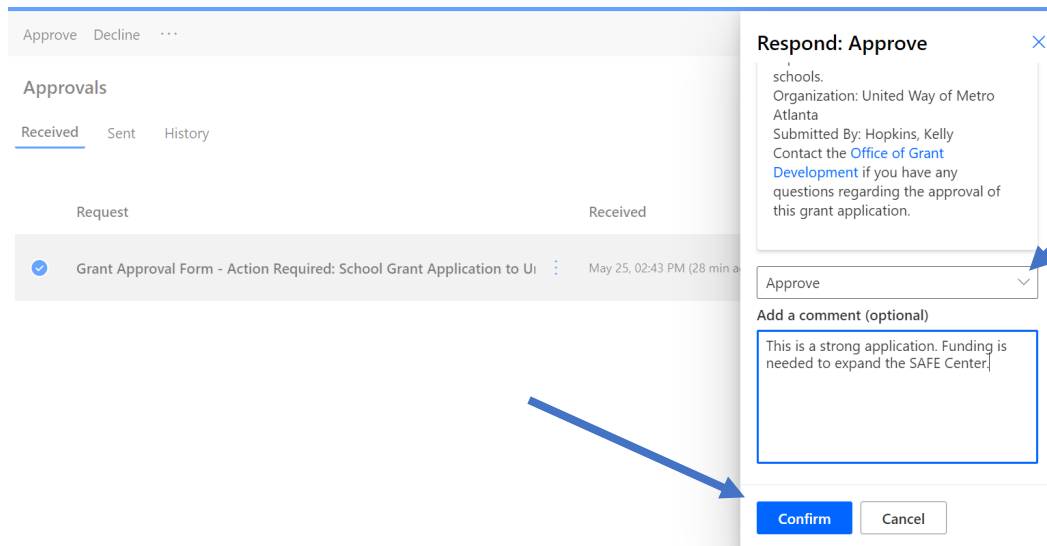
☐ If the approver who received the Microsoft Flow approval email wants to reassign it to someone else to approve, he/she will follow the steps above on the Power Automate platform. In the 'Choose Your Response' field, he/she will click on 'Reassign' and will enter and select the name of the administrator who should approve the grant and then click 'Confirm.' The reassigned administrator will receive the Microsoft Flow email to approve the grant.

The Approvals App on Teams

☐ Another option to approve grant applications is via the Approvals app powered by Microsoft Teams. To install the Approvals app, go to Teams, and then go to the Apps icon on the left-hand menu and search for 'Approvals' in the search box. Follow the prompts to install the Approvals app. Once a Grant Approval Form is routed to you, in Teams, under Activity, you will receive an approval request in your feed that looks like the screen shot below. From this request, you can add comments and either 'Approve' or 'Decline' the grant application. You also can 'Reassign' the request to another approver. In Teams, if you click on the Approvals app, you will see a list providing the status of all the requests that you have received.
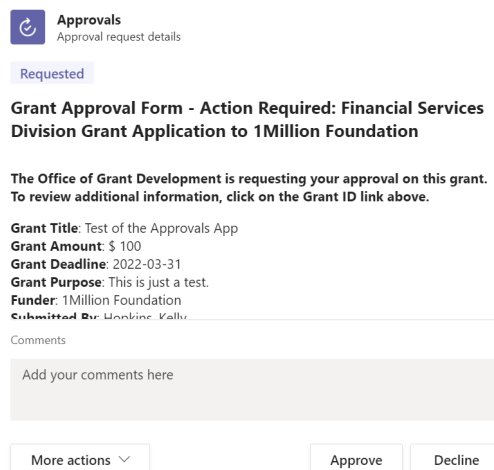
Support

☐ If you have questions on the grant approval process, send an email to grantdevelopment@fultonschools.org or call Ashley Garrison 470-254-4573 / Kelly Hopkins 470-254-6773.