

Special Revenue/Grants General Finance Guidelines/Policy

All grant proposals written by teachers, schools, and departments must be approved by the Office of Grants Management prior to submission. If you are thinking of submitting a grant, please contact the Office of Grants Management first.

Goal: To maintain appropriate program/financial procedures and documentation

1. Schools receiving grant funding or allocations have the primary responsibility for maintaining school-based documentation and an accounting system for those programs.
2. If the Grant allows indirect costs, it must be included in the grant proposal. The current level for indirect costs is 4.53%. Please double check with the Grants Management Office on the current allowable rate prior to submission.
3. If the grant will involve the hiring of employees (part-time or full time), all Human Resource policies and procedures must be followed. Contact Human Resources about the advertising of positions.
4. Budgets should be developed under grant guidelines with account numbers prior to spending funds. When budgeting for stipends/salaries for district employees - appropriate benefits must be included as part of the budget process. Contact the Grants Management Office for budget development assistance.
5. All requests for funding must follow Beaufort County School District Procurement Procedures.
6. All purchase orders, payment requests, and contracts must be processed by the school bookkeeper and approved by the principal before being submitted to Finance for processing. Purchase orders should be complete and include the funding source and account numbers to be charged. District cutoff dates for spending must be followed.
7. All purchase orders/payment requests/contracts must be approved by the appropriate offices prior to purchase. Invoices sent to the Grants Management Office for payment without an approved purchase order or contract will be returned to the school and the school will be responsible for payment. Purchase orders should be keyed into MUNIS in a timely manner to insure prompt payment. An inventory of all grant purchased items must be maintained. Check with the Grants Management Office to determine the required inventory details and information.
8. A W-9 form is required from all vendors before any service is obtained.
9. Stipends paid for contracted services must have documentation of work performed. Stipends paid to district employees will be included in salary and will have all necessary deductions removed.
10. We should not pay overtime (that is put employees in an overtime status) so check time sheet for classified staff for extended day activities so they do not exceed 40 hours a week. If we do have to pay overtime, follow the overtime procedures (See your bookkeeper). Part-time employees should not go over 29 hours a week.
11. Check district travel allowances for approved travel. Registrations for conferences, hotel registrations, and other travel related expenses must be received in a timely fashion if expenses are to be paid prior to travel. Approved travel request forms must be completed.
12. All approved requests for reimbursement must have original receipts attached.

13. Check with bookkeepers or the Purchasing Office to see if quotes/bids are necessary on big ticket items. Technology purchases should have the approval of the Technology Services office to make sure purchases are compatible with the technology plan and other technology at the school site.
14. All appropriate documentation (program/financial) must be maintained at the school site for audit proposes and sent to the district office as requested. Federal and state grant documentation needs to be maintained for at least five years and Foundation documentation as determined by the giver.
15. When in doubt - call/e-mail Finance for help:

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