APPLICATION GUIDE: BCOS WORKING GROUP GRANTS

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Prepared By: McKaylyn Lynch and Shawn Miya

Purpose: This guide defines the procedure for submitting grant applications for the BCOS Working Group grants program and for fund distribution. This document should be kept in the BCOS folder as a reference for members to ensure program cohesion during commission turnover. The grant review process is handled in person at BCOS meetings.

1. **Working groups should work to identify a project to fund**
   In order to pursue grant funding, working groups should begin by reading this application guide and determining if their project idea will meet all of the grant requirements. Prior to applying, members of the working group should have a comprehensive understanding and agreement on the following information:

   Project Alignment and Description: In order to qualify for a grant, BCOS working groups must have a clear explanation for how the project aligns with the mission of the Bloomington Commission on Sustainability. In the project description of the grant application, working groups should provide the focus area of the working group(s), a clear explanation of the scope of the project, the expected goals and measurable outcomes, the anticipated investment needed, and how the project aligns with the BCOS mission and the City's sustainability goals. PROJECTS MUST OCCUR WITHIN BLOOMINGTON CITY LIMITS.

   Project Funding: There is a total of $10,000 annually provided for BCOS working group grants. Preference will be given for projects that request a reasonable amount of funding. While $10,000 is available, it is not advisable to request the full amount in order to provide funding for multiple projects and more than one working group throughout the year. BCOS must vote to approve the project funding. In order to ensure funding can be provided, a purchase order must be in place by the last claims cycle of the City's fiscal year in order to retain funding. This date will be announced to BCOS members as a reminder as year-end approaches. This last claims cycle of the year is generally around the 3rd week of December.

   Project Teams: The project teams should be made up of the members of one or more working groups and applications should be reviewed and supported by all

members. Ideally the team will consist of 2 or more team members (based on the number of members in each participating working group) and there should be a clear understanding of the roles and expectations of each team member in order to provide a clear framework for ongoing project management. Each project team is required to have a designated Project Lead. Project Leads will be the point of contact for City staff and will be responsible for managing the project payments, required paperwork associated with grant dispersal, and ongoing organization of project team meetings. The Project Lead should be clearly identified in the project application.

Project Partners: Working groups may choose an outside vendor to provide materials or services for their project. Please see Step 5 for direct vendor payment procedures. This option is provided as an alternative to reimbursement to the Project Lead. Approved vendor types are:
- Nonprofits
- Small businesses
- Private consulting firms
- Neighborhood associations

2. **Complete and submit the working group grant application**
Once the working group has a well-established project proposal with a detailed budget, working group members should complete the grant application and email it to Shawn Miya, Assistant Director (AD) of Sustainability at shawn.miya@bloomington.in.gov for the initial review and approval of the project. Once approved by the AD, the proposal will be sent to all BCOS members and the proposal review will be added to the "New Business" portion of the agenda for the next BCOS meeting.

3. **Application Review**
During the "New Business" portion of the meeting, a member of the working group will present their project proposal to commission members and allow them the opportunity to ask any clarifying questions about the project. If a quorum is met, commission members may vote to allow the proposal to be voted on at that time. If approved, members will vote to approve or deny the funding request. If quorum is not reached, members may review the proposal but must wait until the next meeting, when quorum is met, to vote on the request.

4. **Grant Agreement**
After the project is approved, the AD will draft a grant agreement between the City and the Project Lead. The AD will send the Project Lead an E-Verify form and a Non-Collusion form which are required for the grant agreement. Once those forms are

received they will be inserted into the draft agreement and sent to the legal department for review and approval which may take several weeks.

5. **Payment**

After the grant agreement is approved by the legal department and all Parties have signed the grant agreement, the AD will set up a Purchase Order for the project with the full project amount. Documents listed below will need to be approved by the Controller's Office before any payments can be processed which may take several weeks.

Two different types of payment for project expenses are available. Project teams will have to determine **one** payment method or the other, not a combination of the two.

1. **Project Lead Reimbursement**
   If the Project Lead chooses to pay for expenses upfront they can be reimbursed with grant funds. Once a project is approved by BCOS members, the staff liaison will send the Project Lead a W-9 form and an Electronic Fund Transfer (EFT) form. These forms will be sent to the Controller's Office so that the Project Lead can be listed as an approved vendor. This step typically takes up to two weeks once the vendor forms are received.

   The Project Lead will then pay for the materials or services upfront, collect the receipts or paid invoices, and submit those documents to the AD for reimbursement. The claim will be sent to the Controller's Office during the next claims cycle for payment which depending on when the claim is received can take up to 4 weeks.

2. **Vendor Purchase Order**
   Vendor(s) selected to purchase materials or provide services are required to be an approved vendor by the Controller's Office. Prior to making any purchases, the Project Lead will provide the vendor name to the AD and the AD will verify vendor status.

   If the vendor is not an approved vendor, the AD will send the Project Lead a W-9 form and an EFT form to give to the vendor. Once those forms are completed, the Project Lead will submit the forms to the AD who will then submit them to the Controller's Office for approval.

   Once the vendor is approved, the Project Lead will submit an invoice(s) from the vendor(s) with the Project Lead's name on it and the project name to the AD. A purchase order will be set up to issue payment directly to the vendor(s) to pay for

materials or services. The claim will be added to the next claim cycle for payment.

If this option is selected as the payment approach, all project expenses must be paid through the vendor purchase order. Project Leads will not be reimbursed for additional expenses once a vendor purchase order. has been set up.

6. **Project Report**
Once a project has been completed, it is expected that working group members are to report the impact of their project within one year of receiving the funding. This will take place at a BCOS meeting during the Report from Commissioners portion of the meeting.