Guidelines for Engaging in Grant Work

Grants & Research Operations (GRO) Office

Hillsborough County Public Schools

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INTRODUCTION AND OVERVIEW

Introduction and Overview

The Grants & Research Operations Office (GRO) is housed in the Climate and Culture division of Hillsborough County Public Schools (HCPS). The mission of GRO is to support the Board's Proposed Strategic Plan and priorities by maximizing resources available to HCPS in order to improve educational opportunities; this, in turn, will improve student learning.

In 2021, Florida ranked behind 44 other states and the District of Columbia in per-pupil allocations, so HCPS relies on funds from grants to fill gaps left by state and local funding. Grant funds address areas of need within the district. For example, supplemental funds allow for the following: the purchase of tangible materials; the refining and improving of critical student services; the introduction and implementation of innovative programming designed to accelerate student learning; and improvements in teacher and administrator practice.

The major functions of GRO include the following:

- Researching, locating, and disseminating grant funding opportunities from local, state, federal, and private sources to schools and the district;
- Convening stakeholders to examine each funding opportunity to assess its alignment to the Strategic Plan and whether or not to pursue the opportunity;
- Coordinating inter-departmental and/or inter-agency grant proposal development;
- Developing high quality, research-based grant submissions and submitting grant proposals to funding agencies on behalf of the district;
- Providing differentiated technical assistance over the life of competitive and select entitlement grant projects;
- Assisting with planning for the successful closeout of competitive grant projects;
- Working collaboratively with a variety of external partners, such as the University of South Florida, Tampa Housing Authority, City of Tampa, etc., to develop mutually beneficial projects that may or may not result in funding for the district;
- Assisting with technical writing for initiatives that support district priorities, such as all letters of support signed by the Superintendent and other applications that may or may not result in funding but contribute to the promotion of a positive district image;
- Monitoring federal and state legislation, appropriations, and regulatory actions that affect grant programs;
- Working closely with the Special Revenue and Assessment and Accountability departments to coordinate submission of requested program and fiscal reports by grantors; and
- Providing professional development, technical assistance, proposal review, and writing assistance to school-level grant writers.

GRO provides a continuum of services from pre-award through post-award of a grant. Please utilize the guidelines contained within this document in order to engage in grant-related work in or with HCPS.

FINDING GRANT FUNDING

Finding Grant Funding

There are several ways you can find a viable grant opportunity. First, GRO continuously searches for new and potential grant competitions. If HCPS is eligible for a particular grant opportunity at the district level, GRO contacts key stakeholders to review the grant purpose and requirements; the stakeholders ensure that the opportunity aligns with the Board's Strategic Plan and make a decision about whether or not to pursue the funding. Should a district-level grant opportunity be pursued, the grant development team, in collaboration with the Superintendent's cabinet, will identify schools to be served under a particular grant project. A member of the grant development team will notify the principals of these schools of the desire for their schools to be included in the grant proposal. The participating schools will then be involved in the development of a competitive application that is submitted by GRO on behalf of the district.

GRO highly recommends that school-level personnel take advantage of the Hillsborough Education Foundation's (HEF) classroom grant program, which is dedicated to helping fund innovative classroom and school projects in HCPS. These projects help excite young minds beyond what some school budgets may allow. HEF uses an automated online grant application platform that allows teachers and principals to post school projects or programs to seek funding from HEF and the community. Hillsborough County Public Schools teachers and administrators may submit applications for consideration. Project requests must be at least $100 and cannot exceed $2,000. On the HEF webpage, go to Links for Teachers, then click on the link for Classroom Grants.

Another way to find funding is for district and school-level personnel to utilize the resources at their disposal to locate potential funding opportunities. For example, national and state professional organizations often make grant funding available to its members.

Routinely checking databases or grant listings is also a way to locate funding opportunities. GRO recommends the following:

Resource	Features
GetEdFunding https://www.getedfunding.com/c/index.web?s@a.zInANnmavUM	Database searchable by key word.
Grants for Teachers http://grantsforteachers.net/; @allk12grants	A free resource for K-12 teachers. Search for K-12 grants by category, location, or grade.
Candid https://candid.org/; @CandidDotOrg	A leading source of information on philanthropy, fundraising, and grant programs. Find funding, training, and research related to foundations worldwide.

GRO also maintains a listing of [grant opportunities](#) on the Grants & Research district webpage. From the Grants & Research webpage, click on the Resources tab and then select Grant Competitions.

Social Media is also a good resource for those seeking grant funding. Check out GRO's Twitter account at @hcps_grants or Teachers on the Move on Facebook. Teachers on the Move also routinely features programs, grants, and scholarships for K-12 teachers.

An additional way to find funding is through an existing or new partner. A local, state, or national partner may approach a contact in the district to discuss a potential funding opportunity. If you are approached by an external partner to discuss a funding opportunity, you should immediately contact GRO to engage the office in grant development.

Regardless of the avenue utilized to find a funding opportunity, all grants must be aligned with the Board's Proposed Strategic Plan and its priorities, as well as each school's School Improvement Plan. HCPS will not pursue funding that does not assist the district in reaching its goals and objectives.

APPLYING FOR SCHOOL-LEVEL GRANTS

Applying for School-Level Grants

Once you have located a viable grant opportunity, school-level personnel are required to file a Grant Application Notification form via the District Forms dropdown on the HCPS Staff Hub. Prior to applying for a grant, school personnel should speak to their principal and garner approval to submit your request.

To access the form please use this link: https://bit.ly/GrantAppNotify.

You may also access the form from the HCPS Staff Hub webpage. Use the District Forms dropdown and select Grant Application Notification Form.

Need Help Crafting a Competitive Proposal?

GRO offers the following technical assistance to school-level personnel applying for grant funding:

- Reviewing grant application requirements
- Helping decipher what a funder is really asking
- Identifying potential issues with a grant requirement
- Advising as to whether something requires Board approval
- Assisting in locating district-approved vendors aligned with your project design
- Reviewing your grant submission and helping to make it more competitive by providing feedback
- Assisting in garnering district-level support to carry out an activity
- Providing required financial documents

Additionally, GRO also offers professional development. **Grant Writing 101** is a three-hour, fast-paced interactive grant writing workshop designed to help participants learn to create a competitive grant application. Teachers will learn basic grant writing skills while developing a proposal based on student or school needs, their School Improvement Plan, and district priorities. Resources for funding and tips for evaluating funding sources will be emphasized. Three hours of in-service will be awarded upon completion of proposal template. A minimum of 10 participants are required to schedule a session. If a school-level team is interested in scheduling this workshop, please contact Lisa.Placko@hcps.net.

SCHOOL-LEVEL GRANT GUIDELINES

School-Level Grants:

Identify a need that aligns with SIP Plan/District Priorities.

Identify a grant or donation source to meet the specified need (see grant competitions listed on our website).

Secure Principal approval to seek funding each time an opportunity is identified.

Notify Grants & Research Operations (GRO) office of your intent to apply for funding by submitting a Grant Application Notification form via the District Forms dropdown on the HCPS Staff Hub.

School personnel will write and complete grant or donation application:

- School personnel will adhere to the district procedures.
- The GRO Point of Contact may review the grant submission should school personnel wish to be provided feedback to strengthen the application.
- GRO will provide technical assistance, if necessary, such as facilitating discussions with district level personnel (e.g., Instructional Leadership Directors, Area Superintendents, Content Supervisors, etc.).
- Some grants require a letter of support from an authorized official. Unless specified by funding agency, the only person who is authorized to sign a letter of support for a grant application is the Superintendent. If a letter of support is needed, submit a draft of the letter of support to GRO two weeks prior to the grant deadline.

Once the Grant Application Notification is received, GRO will assign a Grant Coordinator as a Point of Contact. The Point of Contact will reach out to determine next steps in the grant development process.

Inform GRO, via email, of receipt of the grant or donation award notification.

The grant/donation recipient is responsible for reviewing all reporting required by the funding agency and submitting the requested information by the established deadline(s).

Submit a copy of the award notification and any reporting documents to GRO, as well as a thank you note to private or foundation funders.

Retain all project-related records per the district's record retention guidelines.

School-Level Grants Guidelines

This section pertains to grants for which personnel at a single school wish to apply.

School-based personnel are expected to utilize the following checklist in their pursuit of supplementary funding through grants or donations.

School Grant or Donation Procedures Checklist

____1.   Identify a specific need for a program, school, or classroom that aligns with the district's priorities and the school's School Improvement Plan.

____2.   Identify a grant or donation source to meet the specified need.

____3.   Secure Principal approval to seek funding each time an opportunity is identified.

____4.   Notify Grants & Research Operations (GRO) office of your intent to apply for funding by submitting a Grant Application Notification form. To access the form please use this link: https://bit.ly/GrantAppNotify. You may also access the form from the HCPS Staff Hub webpage. Use the District Forms dropdown and select Grant Application Notification Form.

____5.   Once the Grant Application Notification is received, GRO will acknowledge receipt of the form and, if necessary, assign a Grant Coordinator as a Point of Contact. The Point of Contact will reach out, if necessary, to determine next steps in the grant development process.

       a.   In the following circumstances, the GRO Point of Contact will provide a higher level of technical assistance:

            i.   Grant awards that exceed $10,000 in available funding;

           ii.   Grant competitions that specify only one submission per school district;

         iii.   Grants for which the district must serve as the applicant/fiscal agent rather than the school; and/or

         iv.   Grants for which an external partner will serve as the applicant/fiscal agent.

____6.   School personnel will write and complete grant or donation application.

       a.   Should the proposal include the purchase of equipment or materials, school personnel will adhere to the district procedures for such purchases that are detailed later in this document. Also see **Appendix A, B, and C for additional information regarding Procurement, Purchase Orders, and the HCPS Sales Tax Exemption Form**.

       b.   The GRO Point of Contact may review the grant submission should school personnel wish to be provided feedback to strengthen the application.

       c.   GRO will provide technical assistance, if necessary, such as facilitating discussions with district level personnel (e.g., Division Chiefs, Executive Directors, Content Supervisors, etc.).

____7.   Some grants require a letter of support from an authorized official. Unless specified by funding agency, the only person who is authorized to sign a letter of support for a grant application is the Superintendent. If a letter of support is needed, submit a draft of the letter of support to GRO two weeks prior to the grant deadline. A sample letter of support can be found at LOS-Internal. Also see **Appendix D**. Inform GRO, via email, of receipt of the grant or donation award notification.

a. Upon award, GRO will assist the school in determining next steps, including:
   i. how to submit a grant agreement, if necessary;
      1. Typically, only the Chair of the School Board of Hillsborough County, FL is authorized to sign grant agreements for funded projects of **$10,000 or more**. The Superintendent is the authorized signer for grant agreements that do not exceed this threshold. If the funder requires a grant agreement, GRO will provide guidance to the Principal on how to navigate this process.
   ii. where the budget will be set up, either in the district Budget office, Special Revenue, or at the school site; and
   iii. reporting requirements, including regulations surrounding informed consent and the release of student information.

_____8. The grant/donation recipient is responsible for reviewing all reporting required by the funding agency and submitting the requested information by the established deadline(s).

_____9. Submit a copy of the award notification and any reporting documents to GRO, as well as a thank you note to private or foundation funders.

_____10. Retain all project-related records per the district's record retention guidelines. To find instructions and regulations that apply to your records go to office 365 and, using the SharePoint, type in the name: Records retention & destruction. Email alfredo.colon@hcps.net with additional questions. Also see **Appendix E**.

Single Applicant Competitions

Some funding agency guidelines stipulate that an institution can only submit one application in a given funding cycle. This includes institutions with several departments, divisions, or schools, such as our school district. If this stipulation applies to a grant for which you are applying, multiple requests from district schools within HCPS will be rejected by the funding agency.

For competitions which allow one submission per institution, the district reserves the right to submit a district-level application. In this instance, GRO will publish a notice informing principals of the district's intent to apply in the Principal's Weekly Newsletter; school-based applications will not be permitted.

Should the district not pursue district-level funding for a grant competition that only allows one submission per institution, individual schools/teachers may apply. In this case, the following steps must be followed. These procedures are in addition to the existing grant notification requirements outlined in this document. The minimum lead time for this process is 2 weeks prior to the grant deadline.

1) Upon submission of the Grant Notification form, a GRO staff member will reach out to alert you to the fact that the competition only allows one submission per institution.
2) The teacher applicant will submit their grant proposal, along with all supporting documentation, if any, to GRO.
3) GRO will convene a committee to review the proposals according to a rubric that addresses the grant requirements and district expectations.

4) No later than one week prior to the grant deadline, GRO will notify all teachers of the committee's decision on the application that has been approved for submission to the funding agency.

Contact the Grants & Research Operations Office with questions: Lisa.Placko@hcps.net.

HCPS Procedures for Grant-funded Materials and Equipment

If a request includes materials or equipment, the procedures outlined in this document must also be followed. These guidelines are designed to ensure that materials and equipment obtained in this manner can be appropriately supported and maintained through existing district resources.

How Grant-funded Items Should Be Used

a) Materials or equipment received through the grant process must be used in accordance with the request and purpose stated in the application. The intent of the project must be followed and the use of the item(s) must adhere to the intended educational use.

   i) *Example*: Should a grant fund the purchase of mini white boards or iPads for math lessons at a specific school, then those materials must stay within the math program or department at that school. They would not be able to be used in art class or taken to a different school, even if the teacher who asked for the funding moves to a different school.

b) See section below labeled "Who Owns the Items/Equipment Received through a Grant or Donation?" for further information about ownership of grant-funded items.

c) Important Note: If the equipment has a value of $500 or more ($200 or more for computers, iPads, laptops, and tablets), the following steps must be taken: 1) An SB120 Fixed Asset Acquisition Form must be submitted, and 2) an asset decal will be issued to be placed on the equipment.

d) For ordering computers with grant funds, reference the Computer Ordering document in Business News. Also see **Appendix F.**

e) For ordering iPads and iPad Cases, see iPad-iPad Cases and Accessories Purchasing Guidelines found in Business News. Also see **Appendix G.**

Guidelines for School Crowdfunding Requests

Many funding opportunities that appear to be grants actually fall under the definition of "crowdfunding." Crowdfunding involves funding a project by raising donations of money from a large number of people, typically via the Internet. School personnel are encouraged to try to find traditional grant opportunities for which to apply prior to turning to crowdfunding as an avenue for raising funds.

Any crowdfunding platform activity must be approved by completing the process for Agreement for School Activity*, assure all accounting procedures are followed, and adhere to all District requirements related to fundraising. Prior to engaging in any crowdfunding activity, securing administrator approval is mandatory.

While crowdfunding opportunities can provide a mechanism for raising money for equipment, supplies, and/or materials to supplement instruction or extracurricular activities, they also can result in unintended circumstances that could **negatively impact** school personnel. For instance, GoFundMe requires the recipient of funds to set up an account in his/her name. The funds are then sent directly to the recipient. Funds raised in this manner should be considered taxable income. Most teachers would not want to be subject to such consequences.

Should a school class/club pursue this form of fundraising as an option for gaining financial and/or materials/equipment/supplies they must complete the Agreement for School Activity* document and follow all fundraising guidelines. These guidelines are intended to provide protection for teachers who wish to utilize crowdfunding as a mechanism to raise funds for classroom use or use by extracurricular activities, as well as protection for their administrators and the district.

If a crowdfunding platform is chosen for use, be advised that school personnel are expected to adhere to the following guidelines:

a) Crowdfunding platform fundraising activities will be approved through the Agreement for School Activity process.
b) The representative(s) of companies must meet all vendor requirements including Jessica Lunsford Act (JLA) as well as being cleared through the volunteer screening procedures (including Level 2 screening).
a) The principal or designee must give his/her approval of any crowdfunding activity <u>prior</u> to the communication being released to supporters.
b) Parent consent and other student safeguards must ensure that personally identifiable student information is not collected nor accessed, as defined under the Family Educational Rights and Privacy Act (FERPA).
c) Crowdfunding opportunities must provide the majority of the funding raised to the school, rather than applying the majority of funds raised toward the platform's processing fees.
d) Each group (team or club) will be limited to only one crowdfunding opportunity (which raises cash rather than provides items/supplies) per school year, which requires the *Agreement for*

School Activity approval. The maximum time-period to participate per group will be two weeks for requesting support and two weeks allowed for collection of funds.

e) No crowdfunding accounts may be established in an individual teacher/staff member's name. Crowdfunding accounts must be set up under a school's name and address or a school's parent support organization's name with the school's address.

f) Any materials received or purchased with crowdfunding sources must be added to the school's inventory in accordance with District Property Control policies and procedures. Any materials purchased through school or district accounts must be from District-contracted vendors. If the items are not under contract, District purchasing procedures must be followed. See Business News at this link: https://hillsborough.sharepoint.com/sites/BusinessNews. Also, see **Appendix A**.

g) All non-consumable materials and equipment purchased through grants and/or crowdfunding platforms are the property of The School Board of Hillsborough County, Florida and should be handled according to these guidelines.

Please Note: School-based platforms that deliver assets or materials directly to the school site, such as DonorsChoose, Adopt a Classroom, and HEF's online grant portal are exempt from the Agreement for School Activity. However, all other guidelines apply.

Who Owns the Items/Equipment Received through a Grant or Donation?

a) For any grant-funded or donated item, the ownership is in the name of The School Board of Hillsborough County, FL and district inventory policies apply. Equipment must be identified as "district" property.

b) Items are not the property of the teacher.

 i) *Example*: If Mr. Smith should transfer schools, the item should transfer with him as long as it is within Hillsborough County Public Schools and the principal agrees to transfer it. However, if Mr. Smith stops teaching the subject, changes positions, or leaves the District, the item remains at the school and with that particular subject area or department.

Please Note: If a teacher leaves the school where the project originated, the principal of that school must give consent for that teacher to take funded materials to use in his/her new classroom and the required paperwork (SB126) must be completed in order to transfer the equipment. It is solely up to each principal as to whether to allow the teacher to take the materials to his/her new site.

Special Instructions for Accepting Donated Equipment for a Project

a) Materials or equipment received through a donation must meet the minimum standards of the district for computer equipment to be allowed on the school district network. Non-standard equipment may not be supported by the district's technology infrastructure and may not be able to run district applications. Sites that accept donations that include Windows computers or laptops should verify with Infrastructure and Shared Services or Instructional Technology that the equipment can be supported.

b) For computers, please reference the Computer Ordering document in Business News. Also see **Appendix F**.

c) For iPads, please reference the [iPad-iPad Cases and Accessories](#) Purchasing Guidelines found in Business News. Also see **Appendix G**.

d) If the equipment has a value of $500 or more ($200 or more for computers, iPads, laptops, and tablets), the following steps must be taken: 1) An SB120 Fixed Asset Acquisition Form must be submitted; and 2) an asset decal will be issued to be placed on the equipment.

e) If assistance is required to pick up equipment or if parts are required to bring the equipment up to standards, contact Pablo Penabade at the Technology Operations Center for assistance at (813) 272-4703.

f) Any applications (e.g., "apps") purchased by the school for use on the equipment are owned by the school. Contact the Procurement Department (813-272-4374) for information about purchasing apps.

Minimum Specifications for Acceptable Donations

PC Computer	Macintosh
Processor: 2GHz or faster	Processor: Intel Core 2 Duo (2.4GHz min)
Ram: 4 GB (DDR3)	Ram: 4 GB preferred
Hard Disk: 120 GB (minimum)	Hard Disk: 120 GB (minimum)
Network Interface: Integrated on motherboard and/or 802.11ac dual channel wireless card	Network Interface: Integrated on motherboard and/or 802.11ac dual channel wireless card
Operating System: Windows 10	Operating System: 10.13 or later
Display: SVGA flat panel 20" or larger (no CRTs)	Display: SVGA flat panel 20" or larger (no CRTs)
USB Keyboard and mouse	USB Keyboard and mouse

Tablet PC **	iPad ***
Processor: – Intel Quad Core Atom or better	iPad 3 generation or newer
Ram: 2GB	1 Ghz Dual-Core Apple A5X or better
Hard Disk: 32GB Flash (minimum)	iOS 13 or later
Operating System: Windows 10 or better, Android Enterprise	
Network Interface – built-in wireless	
Display: 7" or larger	

* To be allowed on the production network a Tablet PC must meet the same requirements as a PC computer. Tablets with lesser specs can only be used on the "Guest" network.

** All iPad devices must enrolled into the Intune platform to operate in the production network. Contact Technology Operation Center for instructions at (813) 272-4703.

When a **_Windows laptop/tablet_** is acquired, the following items need to be completed at the school site.

- ✓ Obtain an asset tag for the device from Property Control to meet School Board standards. For items not purchased through the Lawson System, complete the form found in the Staff Hub SharePoint site: staffhub.hcps.net to request an asset tag. Staff Hub >> District Forms >> Property Control >> Fixed Asset Acquisition
- ✓ An asset tag and orange anti-theft decal will be sent to the site when paperwork is processed by Property Control. Affix these decals to the device(s).
- ✓ Bring the device to the Technology Operations Center (address/directions found here) clearly marked with the site name & PO number. Asset tags should be affixed to the device and the asset number engraved on the device.
- ✓ If the device cannot be delivered to the Technology Operations Center, complete an MR with the number of devices and the PO number for someone from the Technology Operations Center to pick up the devices. Asset tags and anti-theft decals should be affixed to the device.

When a ***MacBook or iPad*** is acquired, the following items need to be completed at the school site.
- ✓ See iPad-iPad Cases and Accessories Purchasing Guidelines found in Business News. Business News can be accessed from the Staff Hub SharePoint site.
- ✓ Obtain an asset tag for the device from Property Control to meet School Board standards. For items not purchased through the Lawson System, complete the form found in the Staff Hub SharePoint site: staffhub.hcps.net to request an asset tag. Staff Hub >> District Forms >> Property Control >> Fixed Asset Acquisition.
- ✓ An asset tag and orange anti-theft decal will be sent to the site when paperwork is processed by Property Control. Affix these decals to the device(s).

When a **Chromebook** is donated, the following items need to be completed at the school site:
- ✓ Obtain an asset tag for the device from Property Control to meet School Board standards. For items not purchased through Lawson, complete the form found in the Staff Hub SharePoint site: staffhub.hcps.net to request an asset tag. Staff Hub >> District Forms >> Property Control >> Fixed Asset Acquisition
- ✓ An asset tag and orange anti-theft decal will be sent to the site when paperwork is processed by Property Control. Affix these decals to the device(s).
- ✓ Complete an MR with the number of devices and the PO number for someone from the Technology Operations Center or an Area Field Technician to enroll the Chromebook into the G-Suite Console. Asset tags should be affixed to the device prior to the item(s) being picked up or enrolled.

When a **Windows** desktop computer is donated, the following items need to be completed at the school site:
- ✓ Obtain an asset tag for the device from Property Control to meet School Board standards. For items not purchased through Lawson, complete the form found in the Staff Hub SharePoint site: staffhub.hcps.net to request an asset tag. Staff Hub >> District Forms >> Property Control >> Fixed Asset Acquisition
- ✓ An asset tag and orange anti-theft decal will be sent to the site when paperwork is processed by Property Control. Affix these decals to the device(s).
- ✓ Complete an MR with the number of devices and the PO number for someone from the Technology Operations Center to pick up or image the devices on site. Asset tags should be affixed to the device prior to the item(s) being picked up.

Special Instructions for Devices Not Acquired through Lawson

If you receive devices through a mechanism other than the Lawson system, they will require district upgrades and imaging in order to work on the district's network. This includes Windows laptops or tablets, Macbooks, iPads, Chromebooks, and Windows desktop computers. Follow the directions below when these items are acquired from sources other than Lawson.

Follow guidelines provided in HCPS Procurement Services department's Computer Ordering Information brochure, found at Computer Ordering. Alternately, Staff Hub SharePoint site: staffhub.hcps.net to access the Business News Sharepoint link. (Note: Accessing this information will require HCPS credentials [*Employee ID number and your district password])*

DISTRICT-LEVEL GRANT GUIDELINES

Pre-Award Procedures

Is your grant a large-scale grant which entails one or more of the following elements:
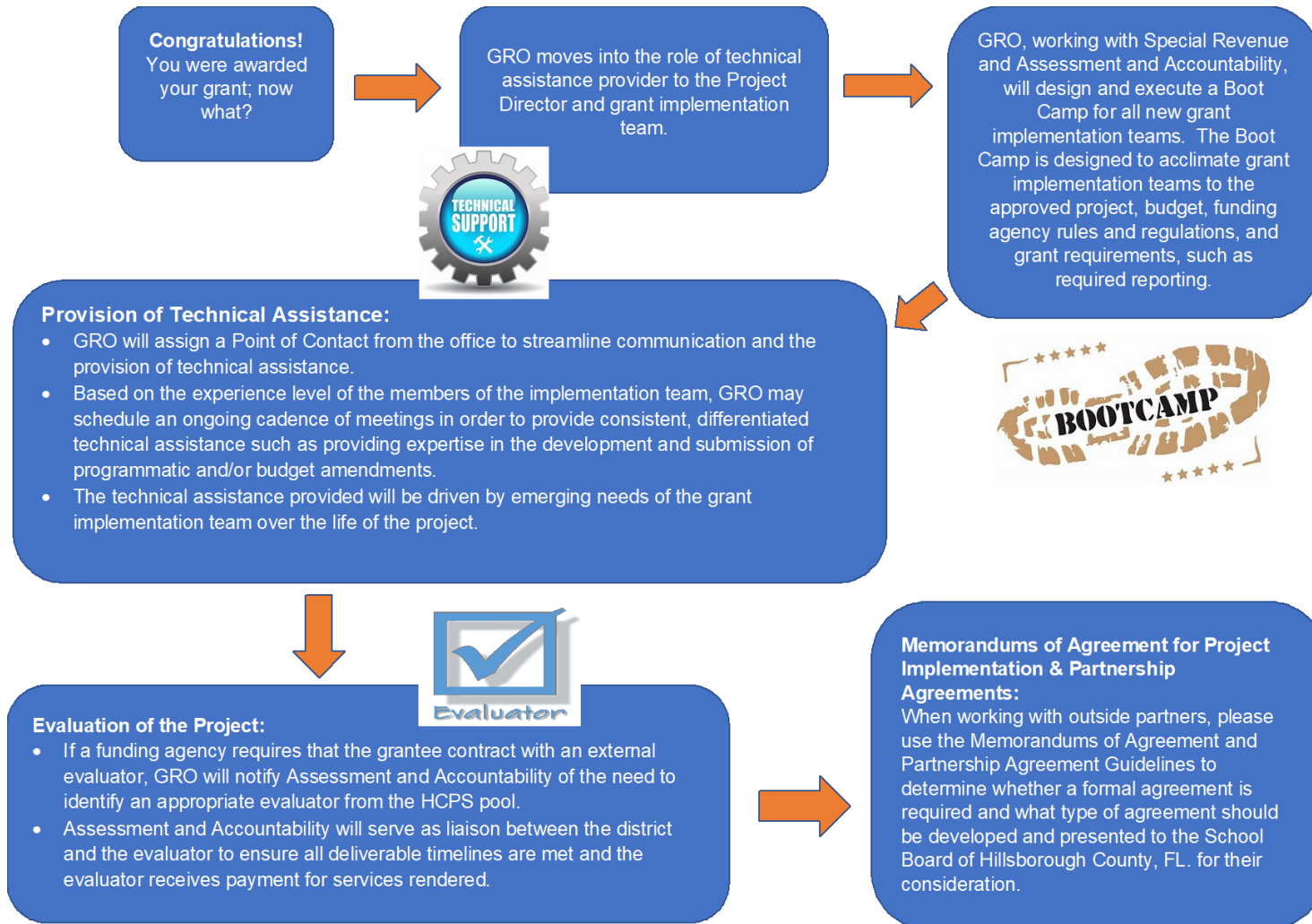- grants that involve more than one school site and/or at least one district division;
- grants for which the district must serve as the applicant/fiscal agent; or
- grants for which an external partner will serve as the applicant/fiscal agent?

Yes → Contact GRO and provide them with a copy of the grant application or link to the grant application information.

→ Ensure that the funding opportunity aligns with district priorities.

No → Refer to School-Level Grant Flow Chart

Preparing a Competitive Grant Proposal:
- GRO will assist in establishing a grant development team.
- Grant development meetings will be held to facilitate the development of a competitive grant application.
- All members of the grant development team are expected to actively participate in all discussions and decision-making related to the proposed project.
- Following each grant development meeting, GRO will send an email disseminating the agreed upon "Next Steps" to gather further information necessary for narrative and budget development (it is important to provide information in accordance with internal deadlines in order to meet funding agency deadlines).

Grant Personnel:
- The grant development team will identify an HCPS employee to serve as the Project Director or the point of contact (for external partner grants).
- The grant development team will identify a potential project Accountant.

→ GRO will be responsible for the grant submission. GRO will prepare the necessary documents, obtain the required signatures, and submit on behalf of the district.

DISTRICT-LEVEL GRANT GUIDELINES

<u>Post-Award Procedures</u>

Congratulations! You were awarded your grant; now what?

GRO moves into the role of technical assistance provider to the Project Director and grant implementation team.

GRO, working with Special Revenue and Assessment and Accountability, will design and execute a Boot Camp for all new grant implementation teams. The Boot Camp is designed to acclimate grant implementation teams to the approved project, budget, funding agency rules and regulations, and grant requirements, such as required reporting.

Provision of Technical Assistance:

- GRO will assign a Point of Contact from the office to streamline communication and the provision of technical assistance.
- Based on the experience level of the members of the implementation team, GRO may schedule an ongoing cadence of meetings in order to provide consistent, differentiated technical assistance such as providing expertise in the development and submission of programmatic and/or budget amendments.
- The technical assistance provided will be driven by emerging needs of the grant implementation team over the life of the project.

Evaluation of the Project:

- If a funding agency requires that the grantee contract with an external evaluator, GRO will notify Assessment and Accountability of the need to identify an appropriate evaluator from the HCPS pool.
- Assessment and Accountability will serve as liaison between the district and the evaluator to ensure all deliverable timelines are met and the evaluator receives payment for services rendered.

Memorandums of Agreement for Project Implementation & Partnership Agreements:
When working with outside partners, please use the Memorandums of Agreement and Partnership Agreement Guidelines to determine whether a formal agreement is required and what type of agreement should be developed and presented to the School Board of Hillsborough County, FL. for their consideration.

District-Level Grant Guidelines

This section pertains to large-scale grants which entail one or more of the following elements:
- Grants that involve more than one school site and/or at least one district division;
- Grants for which the district must serve as the applicant/fiscal agent; or
- Grants for which an external partner will serve as the applicant/fiscal agent.

Pre-Award Processes

1. Preparing a Competitive Grant Proposal

Should the district choose to pursue a district-level funding opportunity, GRO will assist in establishing a grant development team. The grant development team will be comprised of stakeholders and personnel from divisions/departments that may be involved in the implementation of a proposed project. The grant development team, in collaboration with the Superintendent's cabinet, will identify schools to be served under a particular grant program. A member of the grant development team will notify the principals of these schools of the desire of the district for their schools to be included in the grant proposal. The participating schools will then be involved in the development of a competitive application. GRO will schedule one or more grant development meetings and facilitate the development of a competitive grant application.

Members of the development team may also include those who manage other funding sources in the district; this will ensure alignment and leveraging of resources. HCPS will utilize an allocation strategy called "braiding" of funds in order to realize its strategic priorities. Braiding involves the use of various existing or new funding streams in order to support an initiative in as integrated a manner as possible. The funding streams are used for a common purpose to leverage resources in an effective, efficient way to assist HCPS in sustaining effective initiatives over time.

All members of the grant development team are expected to actively participate in all discussions and decision-making related to the proposed project. It is imperative that members bring research-based ideas to the table to inform the design of the project. This may entail providing GRO with that research in order to assist in narrative development.

If a grant development team member is charged with providing costs related to the proposed project, he/she should prepare that information according to district guidelines and processes, such as contacting district-approved vendors to acquire appropriate quotes. Members are expected to provide a detailed breakdown of all proposed costs to GRO in order to inform the development of a reasonable budget that will be used to carry out the proposed work.

Following each grant development meeting, GRO will send an email disseminating the agreed upon "Next Steps" to gather further information necessary for narrative and budget development. GRO will set interim, internal deadlines for the grant development team to meet in order to propel grant development forward and meet the funding agency deadline. It is imperative that team members meet these deadlines or the ability of GRO to produce a competitive application is negatively impacted.

2. Proposing Grant Personnel

Typically, during the grant development process, HCPS will identify a potential Project Director who will manage the proposed project should it be selected for funding. This is, in nearly all cases, a current district employee who has the related content area expertise to carry out the proposed project successfully and who can effectively manage a budget and reporting requirements. In addition, HCPS will identify an accountant who will work with the Project Director to ensure proper spending of funds in accordance with the proposed grant budget and district guidelines.

Project Directors who wish to assign additional district personnel to assist in grant implementation must approach their Division Chief during the grant development process to discuss the feasibility of doing so. Should the Division Chief and Project Director wish to propose a new position be added to the grant budget, a concrete plan to sustain that position beyond grant funding must be provided to the Director of GRO.

If a new position is desired, the Project Director will make a request to his/her Division Chief. The Division Chief will discuss the request with the Deputy Superintendent or Chief of Staff who oversees the area in which the grant will be managed. The Deputy Superintendent or Chief of Staff will review all requests and determine whether or not each request will be approved.

In the case of a grant in which an external partner is serving as the applicant and fiscal agent, HCPS will usually identify a current HCPS employee to serve as the point of contact for grant implementation. The point of contact is usually an employee who possesses the related content area expertise to assist in carrying out the proposed project.

3. Submitting the Grant Proposal

GRO will be responsible for the grant submission. Most agencies require the submission of a grant application through an online system with which GRO will be familiar. Should a hard copy submission be required, GRO will prepare the necessary documents, obtain the required signatures, and submit on behalf of the district.

Post-Award Processes

Once a grant has been awarded, GRO moves into the role of technical service provider to the Project Director and grant implementation team.

1. Boot Camp for Project Launch

GRO, working with Special Revenue and Assessment and Accountability, will design and execute a Boot Camp for all new grant implementation teams. Participants typically include representatives from GRO, Special Revenue, Procurement, and Assessment and Accountability. The Project Director; the accountant/bookkeeper assigned to the project; division representatives, if necessary; and the external evaluator are expected to participate. The Boot Camp is designed to acclimate grant implementation teams to the approved project, budget, funding agency rules and regulations, and grant requirements, such as required reporting. GRO will assist in the initial development of an action plan to establish a

clear way of work, and facilitate discussion regarding the necessary systems and processes that should be established to ensure successful project implementation and avoid potential financial consequences.

2. Technical Service Provision

Following the project launch, GRO will assign a Point of Contact from the office to streamline communication and the provision of technical assistance. Based on the experience level of the members of the implementation team, GRO may schedule an ongoing cadence of meetings in order to provide consistent, differentiated technical assistance such as providing expertise in the development and submission of programmatic and/or budget amendments. The technical assistance provided will be driven by emerging needs of the grant implementation team over the life of the project.

3. Grant-funded Personnel

Grant-funded personnel are required to acknowledge the funding status of their position at least annually. Once a grant is awarded, the Project Director is responsible for disseminating the correct Human Resources (HR) form to all grant-funded personnel (**Appendix H**). These forms are housed at the following link: https://hillsborough.sharepoint.com/sites/EmployeeRelations/SitePages/Employee-Relations--Forms.aspx

There are two different forms available, and they are differentiated by the type of grant-funded employee being placed in a position. The Restricted-Current Employee form is used for personnel who are already employed by HCPS and are accepting a new grant-funded position. The Restricted-New Hire-New Employee is used when the grant-funded employee is someone newly hired from outside the district.

The Project Director is responsible for disseminating these forms to grant-funded employees each year of the project, obtaining the employee's signature, and providing a copy to HR. The Project Director should retain a copy and provide a copy to the grant-funded employee.

As the grant project is implemented, it is the responsibility of the Project Director to design the work of the grant-funded personnel to build district capacity to continue the work beyond the project period of the grant. When the grant is nearing its closing date (approximately one year from grant sunset), the Project Director should begin working with his/her Division Chief to plan for grant closeout and to examine the return on investment of each grant-funded employee and to ascertain the feasibility of retaining effective grant-funded personnel following the project period. If the district budget will not accommodate the inclusion of the employee in the budget following the close of the grant, the Project Director should inform the grant-funded personnel of the intent to eliminate the position effective on the end date of the project period.

If the grant is a competitive grant and was authored and submitted through GRO, the Director of GRO will contact the Project Director and Division Chief one year in advance of the grant's closing date to alert them to the end date of the project and to remind them of the grant-funded personnel on their project.

4. Evaluation of the Project

If a funding agency requires that the grantee contract with an external evaluator, GRO will notify Assessment and Accountability of the need to identify an appropriate evaluator from the HCPS evaluator pool. Assessment and Accountability maintains a pool of qualified evaluators and an evaluator with the appropriate qualifications and experience will be identified by Assessment and Accountability through established district processes to serve on the project. Once the grant is awarded, Assessment and Accountability is responsible for contracting with a qualified evaluator to provide the services required to meet the funding agency's reporting deliverables. Assessment and Accountability will serve as liaison between the district and the evaluator to ensure all deliverable timelines are met and the evaluator receives payment for services rendered.

5. Memorandums of Agreement for Project Implementation & Partnership Agreements

Depending on the scope of work that a partner or the district has committed to provide, a formal agreement may be necessary. Please use the guidelines accessed through the link provided below to determine whether a formal agreement is required and what type of agreement should be developed and presented to the School Board of Hillsborough County, FL for their consideration.

Memorandums of Agreement and Partnership Agreement Guidelines is located in Business News - Home (sharepoint.com). *(Note: Accessing this information will require HCPS credentials [Employee ID number and your District password]).* Also, see **Appendix I** for Contractual Relationships and Partnership Continuum information.

EXTERNAL PARTNERSHIP PROJECTS

External Partnership Projects

This section should be utilized by an external organization who wishes to partner with HCPS in a grant-funded project.

The following checklist is intended to guide external district partners interested in collaborating with HCPS in applying for grant funding.

External Partnership Project Checklist

____1.   Identify a specified need for a program that aligns with the partner's and district's priorities.

____2.   Identify a grant to meet the specified need.

____3.   Notify Grants and Research Operations (GRO) via email (Lisa.Placko@hcps.net) or phone (813-272-4880).

____4.   GRO will assist in identifying and notifying all relevant district stakeholders who are required to approve participation (e.g., school principal, Division Chief, Executive Directors, Content Supervisors, etc.).

____5.   Partner will schedule meetings to provide district stakeholders with an opportunity to give input on a viable project design. GRO will provide boilerplate language, and the HCPS Office of Assessment and Accountability will provide access to relevant data that may be used to strengthen the proposal.

____6.   Partner will submit a draft letter of support to GRO a minimum of two weeks prior to the grant deadline. Unless specified by the funding agency that an exception should be considered, the only person who is authorized to sign a letter of support for a grant application is the Superintendent. A sample letter of support can be found at LOS-External. Also, see **Appendix J**.

____7.   Inform GRO, via email, of receipt of the grant award notification.

____8.   Contact GRO for assistance if a contract, grant agreement, or MOU is required. GRO will provide support to the HCPS Point of Contact for the project with adhering to district guidelines, to include submission for review and approval to the District's attorney. * *Please Note: The School Board approval process requires an average of 6-8 weeks after the agreement language is agreed upon by both parties.*

Contact the Grants & Research Operations Office with questions: Lisa.Placko@hcps.net.

Letter of Support (LOS) Requests

This section provides guidance to external partners who wish to receive a letter of support from HCPS for a partnership project or in support of an initiative that aligns with the district's Vision and Mission.

Unless specified by the funding agency that an exception should be considered, only the Superintendent of HCPS is authorized to sign a LOS on behalf of the district. In order for the Superintendent to consider a LOS request, send a full draft of the LOS you wish for the Superintendent to consider to GRO at Lisa.Placko@hcps.net.

The request should be made a minimum of two weeks prior to the deadline to submit the letter to the funding agency. Not providing the appropriate time to meet the request may result in the district not being able to consider the request.

Once a LOS request is received, GRO will work with the appropriate district personnel to vet the proposed project to ensure that the district is able to support its implementation. Should the district decide to support the project, the LOS will be provided. If the district is unable to support the project, the Director of GRO will communicate this to the external partner and articulate the reasons that contributed to the decision.

CONCLUSION

Conclusion

Grant funding can be a great tool for educators! Grant opportunities can provide resources to enhance the educational experience for students and, ultimately, positively affect their achievement. From professional development, supplemental curriculum, school supplies and equipment to field trips—there may be a grant out there that can help you seed innovative programming in your classroom. GRO can help you in your quest to find and win grant funding!

School-level personnel, please keep these tips in mind as you seek funding to supplement your programs:

- Consider organizing a Grant Writing 101 workshop at your school
- Regularly search for grant opportunities, as new grant opportunities are released throughout the year
- Get principal approval prior to applying for a grant
- File a Grant Notification Form at least two weeks prior to your grant deadline
- Design a project that is in line with current district initiatives and priorities, as well as your School Improvement Plan
- Utilize the School-Level Grant Guidelines in the development and implementation of your project
- Reach out to GRO for assistance in developing a competitive proposal

The Grants & Research Operations Office wishes you the best of luck in your funding pursuits

Have a GRANT day!

APPENDIX A

Hillsborough County
PUBLIC SCHOOLS
Preparing Students for Life

Procurement Services
Thresholds and Methods
Effective April 4, 2019

Instructions:

- Always check to see if a current District agreement exists by contacting the Procurement Department. If no agreement currently exists, proceed with one of the methods below.
- If needed, contact the Procurement Department to assist you in finding suppliers. Check the Office of Supplier Diversity's website (http://www.sdhc.k12.fl.us/osd/) for local vendors.
- Existing agreements and vendor spend must be reviewed for current spend through the Procurement Department. An increase to previously estimated and awarded spend may require additional board approval.
- Per FLDOE F.A.C. 6A-1.012, districts may not divide the procurement of commodities or contractual services so as to avoid threshold requirements.
- Even though an individual purchase may be below a certain threshold, the total district spend may be greater. Individual purchases are combined with all District purchases, as the District is one entity as a whole. All District spend over $50,000 requires Board approval, per State purchasing rules.

Annual (Fiscal Year) Purchase Total	Policy	Procedure
Less than or equal to $5,000.00	Use good business practices	✓ To ensure the best price, you may want to obtain written or telephone quotes. If necessary, contact the Procurement Department to assist you in finding suppliers.
From $5,000.01 through $10,000.00	Telephone Quotes	✓ Obtain three telephone quotes. ✓ Complete telephone quote form found in Procurement Department News. ✓ Comments in requisition should read: "Telephone quotes obtained from vendor 1, vendor 2, and vendor 3 (use vendors' names). Records maintained at site." ✓ Keep completed quote form at your site. The Procurement Department or auditors may request copies. The Procurement Department reserves the right to verify, re-quote the items, or require written quotes.
The following is processed by Procurement with the exception of specifications supplied by site:		
From $10,000.01 through $50,000.00	Electronic Quote	✓ Complete specification section of Invitation to Quote (ITQ) Form and email to the Procurement Officer (call Procurement for assigned officer, if needed). ✓ Allow at least 10-15 business days for solicitation and award. ✓ The Procurement Department will contact you with the winning vendor information. ✓ Complete a requisition with the ordering instructions from Procurement.
$50,000.01 or higher	ITB, RFP, or ITN	✓ Contact the Procurement Department to initiate the competitive bid process. ✓ Assist Procurement Officer with item specifications. ✓ Allow at least 90 days for solicitation and award. ✓ The Procurement Department will contact you with the winning vendor information and Lawson item numbers. ✓ Requisitions must have Lawson item numbers.
Agreements for Technical Services	ATS	✓ Contact the Procurement Department for agreement review and to check District total spend. ✓ The end-user will prepare the ATS agreement and send to the District's Contracts Manager for review and an assigned contract number. ATS agreements greater than $10,000 will require Board approval. ✓ Review and follow all steps posted under ATS Instructions in Business News
Sole Source	Sole Source Letter	✓ Obtain a sole source letter from the vendor. Forward the letter and department justification of need to the assigned Procurement Officer. ✓ The Procurement Department will verify and seek General Manager of Procurement approval if less than or equal to $50,000 and Board approval if greater than $50,000. ✓ The Procurement Department will negotiate price, delivery, and terms. ✓ The Procurement Department will contact you with the winning vendor information and Lawson item numbers, if applicable.

Updated: 2020-01-08

APPENDIX B

TERMS AND CONDITIONS

THE FOLLOWING TERMS AND CONDITIONS APPLY TO ALL PURCHASE ORDERS FOR HILLSBOROUGH COUNTY PUBLIC SCHOOLS ("HCPS") INCLUDING THE ORDERS ENCLOSED. WHEN BID, PROPOSAL, CONTRACT TERMS, OR CONDITIONS AND SPECIFICATIONS DIFFER FROM THOSE SHOWN ON THE PURCHASE ORDER; THE BID, PROPOSAL, OR CONTRACT SHALL TAKE PRECEDENCE OVER THE PURCHASE ORDER.

I. GENERAL INSTRUCTIONS TO SUPPLIER

1. When signed, this is a formal Purchase Order to buy the goods/services specified at the prices stated. Immediately report errors to the General Manager of Procurement or designee listed on the purchase order to request a revision to the purchase order.
2. Changed or altered cost of goods/services may result in a return or cancellation at the Supplier's expense if delivered without prior approval of the General Manager of Procurement or designee.
3. HCPS' State Sales Tax Exemption Number is 85-8012621971C-8 and the Federal Excise Tax Exemption Number is 59 72-0088 K.
4. All invoices shall contain the purchase order number, Supplier's name, Supplier's phone number, quantities, item descriptions, units of measure, and addressed to:
   Hillsborough County Public Schools
   Accounts Payable Department
   P.O. Box 3408
   Tampa, Florida, 33601-3408
5. The purchase order number shall be on all invoices, packages, bills of lading, correspondence, and any other documents pertaining to the order.
6. The discount period will start upon the receipt of goods/services or a correctly completed invoice, whichever occurs last.
7. All shipment receipts must be within 30 days from receipt of this purchase order unless otherwise specified. If unable to deliver by the date specified, contact the General Manager of

Procurement or designee immediately. If the goods are not as specified, HCPS will not be responsible for payment or return except at the Supplier's expense.
8. Upon initial purchase, the Supplier must provide HCPS Material Safety Data Sheets ("MSDS"), in compliance with OSHA's Hazard Communication Standard. An additional MSDS must be sent to:
   Hillsborough School District Safety Office
   4224 W. Crest Avenue
   Tampa, Florida 33614
   Telephone: (813) 872-5263
   Facsimile: (813) 356-1471
9. Effective September 1, 2005, changes in legislation under the Jessica Lunsford Act now require all HCPS Supplier and subcontractor representatives to undergo a Level II background screening, which consists of an FDLE/FBI search if Supplier representatives will be at a school when students are present, have direct contact with students, or have access to or control of school funds. If no personnel meet any of the three criteria, the law does not apply and no action needed. Additional information is available by visiting: www.sdhc.k12.fl.us/Procurement/JessicaLunsfordAct.asp
10. Electronic transmittal of this purchase order, by facsimile machine or other means, shall have the legal significance of a duly executed original delivered to the Supplier.
11. Payment(s) will be made to the Supplier at the address specified for remittance by mail or by electronic transmission.

II. SHIPPING AND RECEIVING INSTRUCTIONS

1. **Delivery**: All shipments are to be made F.O.B. destination, freight prepaid, to receiving point as specified on the purchase order, unless otherwise indicated on the order. HCPS reserves the right to cancel this order, or any unfilled portion for shipments not received as specified.
2. **Marking**: Include packing list in each shipment. Packing list must clearly show the HCPS purchase order number, contents, and shipper's name and address; mark packing list and invoice covering final shipment "Order Completed." Failure to provide a packing list with shipment will allow for acceptance of HCPS buyer's count. Mark (upper left corner of) each package (box, crate, barrel, bundle piece) clearly with (a) shipper's name and address, (b) contents, (c) HCPS purchase order number, and (d) bill of lading number of express receipt number. Supplier's failure to show, on bill of lading, express receipt, or package, the marking as specified above will obligate the Supplier for any extra costs incurred including drayage or demurrage.

3. **Receiving Hours**: Shipments to HCPS facilities receiving hours are from 8:00 a.m. to 3:00 p.m., Mondays through Fridays, excluding HCPS holidays.
4. **Invoices**: Render itemized invoices as indicated in Section I, paragraph 4, "General Instructions to Supplier." HCPS will return invoices without the correct HCPS purchase order number. Separate invoices are required for each purchase order. The "Ship To:" address shall be on each invoice. Returnable containers require separate billing, subject to prompt return, and transportation charges collect.
5. **Payment**: HCPS complies with the Florida Prompt Payment Act (ss. 218.70-218.80). Invoice payment is Net 45 days from the date of delivery or the receipt of satisfactory invoice, whichever occurs last, unless invoices specify early payment discounts. All payments, other than payments for construction services, due and not made within the time specified by this section bear interest from 30 days after the due date at the rate of 1 percent per month on the unpaid balance.

III. CONDITIONS

1. **Authorization**: HCPS shall assume no liability or obligation to pay for delivered goods/services without a valid purchase order assigned by the General Manager of Procurement or designee.

2. **Change and Alteration**: No changes in conditions, prices, quantities, or deliveries will be made without specific written authorization (change order-Purchase Order Revision) issued by HCPS' General Manager of Procurement or designee. Supplier must immediately report mistakes in prices, discrepancies in quantities, or sizes to the General Manager of Procurement or designee.

3. **Specifications**: Any product/service specifications in the associated bid response and all items attached hereto are hereby made a part hereof as if fully set forth herein. All materials furnished must conform to HCPS specifications, where indicated. There will be no substitutions to requested goods/services without prior approval of the General Manager of Procurement or designee.

4. **Warranty**: The vendor expressly warrants all articles and materials covered by this order to be of quality, quantity, size, description, and dimension specified and free from defects including latent defects. Such warranty shall survive delivery and not be deemed waived by reason, acceptance of receipt, or payment of goods/services.

5. **Inspection Acceptance of Goods**: Goods/services are subject to HCPS inspection and approval at a reasonable time post delivery. HCPS may return materials not meeting specifications (including over-shipments) at the Supplier's expense and risk. HCPS will notify Supplier of failure. Return authorizations for goods/services not received within 30 days will deem such goods/services as donations to HCPS.

6. **Cost of Inspecting or Testing**: Supplier will pay for cost of inspection or testing of property that does not meet specifications. There shall be no replacement of returned or rejected goods/services without prior approval by the General Manager of Procurement or designee. HCPS may return any goods that differ from provided samples, inferior quality, inferior workmanship, or decreased function.

7. **Price**: Except as indicated in Section I, paragraph 2, "General Instructions to Supplier", no order shall be filled where the cost of goods/services has increased

8. **Default**: Supplier default may allow HCPS to procure goods/services from other sources and deduct any monies due, or may become due, to the Supplier, the difference between the price named in the bid/proposal/contract or purchase order and the actual cost to HCPS. HCPS paid prices are the prevailing market price.

9. **Contract**: Supplier received bid/proposal/contract, or purchase order, attached hereto, or by reference, shall constitute, (a) a binding contract on the terms set forth herein, and (b) the entire contract, and is interpreted, construed, and given effect in all respects according to the laws of the State of Florida.

10. **Federal Debarment Certification**: Supplier and its principals agree that acceptance and/or performance of this purchase order constitutes compliance with the Federal Debarment Certification, as required by Executive Order 12549, Debarment and Suspension, and implemented at 34 CFR, Part 85, as defined at the 34 CFR Part 85, Sections 85.105 and 85.110-(ED80-0013).

11. **Public Entity Crimes**: Supplier certifies, by acceptance of this purchase order, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction per the provisions of Florida Statute 287.133 (2) (a).

12. **Fair Labor Standards Act – "Hot Goods"**: Supplier certifies, by acceptance of a bid/proposal/contract, or purchase order, that goods/services are, or will be, produced in compliance with all applicable requirements of sections 6, 7, and 12 of the Fair Labor Standards Act, as amended, and of regulations and orders of the United States Department of Labor issued under section 14 thereof.

APPENDIX C

FLORIDA

Consumer's Certificate of Exemption

DR-14
R. 10/15

Issued Pursuant to Chapter 212, Florida Statutes

85-8012621971C-8	09/30/2017	09/30/2022	COUNTY GOVERNMENT
Certificate Number	Effective Date	Expiration Date	Exemption Category

This certifies that

SCHOOL DISTRICT OF HILLSBOROUGH COUNTY
AND ALL SUBORDINATE DISTRICT SCHOOLS
901 E KENNEDY BLVD
TAMPA FL 33602-3502

RECEIVED

MAY 1 1 2017

JEFF EAKINS
SUPERINTENDENT

is exempt from the payment of Florida sales and use tax on real property rented, transient rental property rented, tangible personal property purchased or rented, or services purchased.

FLORIDA

Important Information for Exempt Organizations

DR-14
R. 10/15

1. You must provide all vendors and suppliers with an exemption certificate before making tax-exempt purchases. See Rule 12A-1.038, Florida Administrative Code (F.A.C.).

2. Your *Consumer's Certificate of Exemption* is to be used solely by your organization for your organization's customary nonprofit activities.

3. Purchases made by an individual on behalf of the organization are taxable, even if the individual will be reimbursed by the organization.

4. This exemption applies only to purchases your organization makes. The sale or lease to others of tangible personal property, sleeping accommodations, or other real property is taxable. Your organization must register, and collect and remit sales and use tax on such taxable transactions. Note: Churches are exempt from this requirement except when they are the lessor of real property (Rule 12A-1.070, F.A.C.).

5. It is a criminal offense to fraudulently present this certificate to evade the payment of sales tax. Under no circumstances should this certificate be used for the personal benefit of any individual. Violators will be liable for payment of the sales tax plus a penalty of 200% of the tax, and may be subject to conviction of a third-degree felony. Any violation will require the revocation of this certificate.

6. If you have questions regarding your exemption certificate, please contact the Exemption Unit of Account Management at 800-352-3671. From the available options, select "Registration of Taxes," then "Registration Information," and finally "Exemption Certificates and Nonprofit Entities." The mailing address is PO Box 6480, Tallahassee, FL 32314-6480.

NOTE TO VENDORS –

A list of school sites is no longer provided by The Florida Department of Revenue. If you have questions concerning this decision, please contact the Exemptions Office of Florida Department of Revenue at: 850-717-6626

APPENDIX D

Date

(Funding Agency's full mailing address)

Dear (Funding Agency's Contact Person):

I am writing this letter in support of the (grant project name) project being developed by (full name of school) for (time frame). The purpose of the project is (Insert purpose here – *i.e., "to improve academic achievement of students via training for teachers that promotes exemplary science instruction"*).

(In paragraph 2, provide a brief summary of the project design that you are proposing.)

(In paragraph 3, describe why your school is worthy of receiving funding for the proposed project.)

On behalf of Hillsborough County Public Schools, I wholeheartedly endorse this project. I urge you to give this proposal your full consideration, as it will support our district's vision of *Preparing Students for Life*. (Modify this closing paragraph to align with your proposed project, i.e., alignment with your school's vision or mission, School Improvement Plan, etc.)

Sincerely,

Addison G. Davis
Superintendent of Schools

APPENDIX E

Hillsborough County
PUBLIC SCHOOLS
Excellence in Education

InterOfficeCommunication

Alfredo I. Colon, Records Management Liaison Officer
Information Services Department

Date: July 15, 2021

To: All Principals, Supervisors and Program Directors

From: Alfredo I. Colon, Records Management Liaison Officer

Subject: **2021-2022 Records Destruction & Retention**

Once you have decided to destroy records or storage them you must:

1. Fill out the Records Disposition form. By going to your office 365 using the SharePoint type in the name: <u>Records retention & destruction.</u> There you will find instructions and regulations, which will apply to your records.

 (Note: Due to storage space only the 9000 sites can store at the warehouse).

2. Send the original form for approval. To: Information Services, Route 7, Attention Alfredo I. Colon.

3) **These are the** steps for records pickup either for storage or destruction

A). First step is getting your disposition form signed for approval in with accordance with the provision of Rule 1B-4 Florida administrative code, district policy number 8310,8320,8330.

B). Second step request for a Maintenance request to logistics with the facilities maintenance system. Note: (Ask you site Administrator for who has this access)

 C). Third step forward Digital signed form of approval but make sure you have the Maintenance request number attached to your signed form. Then send to Denise.Castillo@hcps.net or Janet.Saldinas@hcps.net (the form must be signed first before the warehouse should schedule for pickup.

The benefit is that you can follow the process of your request on the online Maintenance request

(Please note there is going to be a 30 days turn around for the pick-up for destruction. They will not pick them up unless the form is approved by the Record Management Liaison Officer.

4. **Very Important**: You **must print** and have the driver sign the form in box number (7).

5. **Finally, return the completed form to Alfredo Colon @ I.S.** This form will become a permanent record.

If you have any questions or need clarification, call me at 272-4244 or email me at alfredo.colon@hcps.net

Once you have done all 3 steps the warehouse is your point of contact for pickup Status

				NO.		
RECORDS DISPOSITION DOCUMENT				PAGE	OF	PAGES

1. AGENCY NAME and ADDRESS	2. School Name or Site name, address point of contact.
School District of Hillsborough County 901 E. Kennedy Blvd. Tampa, Florida 33602 School Mail: Information Services Rossac: Rt 7 Attn: Alfredo I. Colon RMLO	Phone Number Route Number _____

3.   NOTICE OF INTENTION: The scheduled records listed in Item 5 are to be disposed of in the manner checked below (specify only one).

a. **Destruction** _____ | b. **Storage** _____

4.   SUBMITTED BY: I hereby certify that the records to be disposed of are correctly represented below, that any audit requirements for the records have been fully justified, and that further retention is not required for any litigation pending or imminent.

Print name and Title   Signature   Date

5.   LIST OF RECORD SERIES

a. Schedule No.	b. Item No.	c. Title name of record	d. Retention years	e. Document Starting Dates	f. Number of Box's	g. Completed After Authorization
				Total box's		

6.   DISPOSAL AUTHORIZATION: Disposal for the above listed records is authorized. Any deletions or modifications are indicated.

_____
Records Management Liaison Officer   Date

7.   DISPOSAL CERTIFICATE: The above listed records have been disposed of in the manner and on the date shown in column g.

Signature   Date

Name and Title

_____
Witness

APPENDIX F

Hillsborough County
PUBLIC SCHOOLS
Preparing Students for Life

Procurement Services
Computer
Ordering Information

Overview
The following information will assist you with ordering Computers and related items. For additional products not listed, please search the vendor websites or the Lawson Shopping Cart. If additional assistance is needed please contact the procurement team listed below for assistance.

Contact Information
The Procurement Service's District Support Team is responsible for the procurement of Computers and related items. If you need assistance, please contact the District Support Team:
- Procurement, District Support Team: 272-4369

Comments to Vendor: You **must** include the following information to avoid having your requisition cancelled.

Site Contact: Name, Phone number with extension
Group Tag ID: Site number
Devise Use: Staff or Student

Requisitions submitted without the information above will be rejected and Admins will have to re-enter with correct information. This potentially will delay orders.

Vendors

Company	Vendor #	Contact	Phone Number	Email
UDT – United Data Technologies	109508	Shari Holtmeier Account Manager	813-220-9429	sholtmeier@udtonline.com
		Vicki Borja Inside Sales Representative	800-882-9919 X5932	vborja@udtonline.com
		Enrique Perez Inside Sales Representative	800-882-9919 X5298	eperez2@udtonline.com
		Melissa Velez Delivery and installation Coordinator	407-288-5533	mvelez@udtonline.com
		Scheduling and Installations		HCPSScheduling@udtonline.com

Company	Vendor #	Contact	Phone Number	Email
CDW-G	83592	Matt Antonucci Account Manager	877-663-8569	mattant@cdwg.com
Gov Connection (GCI)	52713	Jamie Stoltze Account Manager	800-800-0019 x75520	jamie.stoltze@connection.com

Hillsborough County
P U B L I C S C H O O L S
Preparing Students for Life

Ordering Information

UDT
United Data Technologies

Welcome to United Data Technologies Inc (UDT) new Store front! To access the site, please log on to the following URL.

https://usmb.channelonline.com/udtonline/storesite/

Anyone with access to the "old" UDT site was provided access to the "new" UDT site that went live in April 2021.   If you are a new user and require access, please email Vick Borja to request an account using your District (hcps.net) email address and your site address. Once you register, you will receive an email from UDT with a link to create your password.

To reset your password, use:
https://xchange.udtonline.com/storesite/Login/restore_password?userId=52616e646f6d495686141 9ac2ed5eec8a07251bb5b53c970&akey=IdgMZhtbPWK2poB

You will have access to all of HCPS approved devices with Lawson numbers. You will use this information to create your requisition in Lawson. Order and delivery information will be available under "Account" section of the website.

Product Information
All orders for Hewlett Packard desktop, workstation and laptop will include the following: imaging, installation, and/or etching.

For each desktop, workstation and laptop, the following must be included for **EACH** device ordered:
- Lawson 3032201, Light Speed Filter-UDT, $19.00 ea.
- Lawson 3032387, Autopilot Basic With Intune-UDT, $18.00
Please use object code **644** for these items.

Receiving Instructions:
When the computer/laptop is received at the site, please enter a receiver for all items pertaining to the device order. You will enter a receiver for the computer/laptop, Light Speed and Autopilot with Intune.   Please **do not** enter a receiver for **only** the Light Speed if you have not received the device yet.

***** NOTE: Monitors are purchased separately. *****
***** NOTE: Printers include installation. *****

Hillsborough County
P U B L I C   S C H O O L S
Preparing Students for Life

Procurement Services
Computer
Ordering Information

Ordering Information

CDW-G items may be found in the Lawson shopping cart.

For each desktop, workstation and laptop, the following must be included for **EACH** device ordered:
- Lawson 3032355, Light Speed Filter-CDW, $17.50 ea
- Lawson 3032356, Autopilot Basic with Intune-CDW, $10.00 ea

Please use object code **644** for this item.

Receiving Instructions:

When the computer/laptop is received at the site, please enter a receiver for all items pertaining to the device order. You will enter a receiver for the computer/laptop, Light Speed and Autopilot with Intune.   Please **do not** enter a receiver for **only** the Light Speed if you have not received the device yet.

Ordering Information

Connection | we solve IT

Student devices:

Lawson#	Description	GCI
		v# 52713
3032057	LAPTOP EVOLVE III EBOOK-STUDENT DEVICE	$ 266.18
3032174	LIGHT SPEED FILTER -GCI	$ 19.99
3032198	Autopilot Basic with Intune	$ 9.00
3032199	Asset tag print and apply tier 3 (Silver tamper evident Or White Poly	$ 2.80

Please use object code **644** for this item.

Receiving Instructions:

When the computer/laptop is received at the site, please enter a receiver for all items pertaining to the device order. You will enter a receiver for the computer/laptop, Light Speed and Autopilot with Intune.   Please **do not** enter a receiver for **only** the Light Speed if you have not received the device yet.

Donated Computers and Tablets Information

When a **Windows laptop or tablet** is donated, the following items need to be completed at the school site:

- Obtain an asset tag for the device from Property Control to meet School Board standards. For items not purchased through Lawson, complete the form in IDEAS to request an asset tag. IDEAS→District→District Forms→Fixed Asset Acquisition
- An asset tag and orange anti-theft decal will be sent to the site when paperwork is processed by Property Control. Affix these decals to the device(s) and engrave the asset number on the device
- Bring the device to:

Technology Operations Center
8921 Brittany Way
Tampa, FL 33619
(use the directions matrix here for a full map: Directions Matrix)

- Be sure the device is clearly marked with the site name & PO number. Asset tags should be affixed to the device and the asset number engraved on the device prior to dropping the item(s) off.
- If the device cannot be delivered to the Technology Operations Center, complete an MR with the number of devices and the PO number for someone from the Technology Operations Center to pick up the devices. Asset tags should be affixed to the device and the asset number engraved on the device prior to the item(s) being picked up.

When a **Macbook or iPad** is donated, the following items need to be completed at the school site:

- Obtain an asset tag for the device from Property Control to meet School Board standards. For items not purchased through Lawson, complete the form in IDEAS to request an asset tag. IDEAS→District→District Forms→Fixed Asset Acquisition
- An asset tag and orange anti-theft decal will be sent to the site when paperwork is processed by Property Control. Affix these decals to the device(s) and engrave the asset number on the device
- Procedures from the HCPS Apple Facilitator Program Implementation Guide should be followed to enroll the device in the JAMF Mobile Device Management System

When a **Windows desktop computer** is donated, the following items need to be completed at the school site:

- Obtain an asset tag for the device from Property Control to meet School Board standards. For items not purchased through Lawson, complete the form in IDEAS to request an asset tag. IDEAS→District→District Forms→Fixed Asset Acquisition
- An asset tag and orange anti-theft decal will be sent to the site when paperwork is processed by Property Control. Affix these decals to the device(s) and engrave the asset number on the device
- Complete an MR with the number of devices and the PO number for someone from the Technology Operations Center to pick up or image the devices on site. Asset tags should be affixed to the device and the asset number engraved on the device prior to the item(s) being picked up.

APPENDIX G

Procurement Services
iPad & iPad Cases
Purchasing Guidelines

Overview
The following information will cover iPad and iPad Cases Purchasing Guidelines. For additional information, contact the Procurement team listed below for assistance.

Contact Information
The Procurement Service's Educational Support Team is responsible for the procurement of iPads and iPad Cases. If you need assistance, please contact the Educational Support Team at:

- Procurement, Educational Support Team: 272-4371

***** Please read the iPad ordering process before contacting the Vendor for a quote! *****
*** The Vendor must be contacted for a quote, to verify pricing, prior to each order ***

iPad Vendor
Click on underlined vendor names or contacts for websites or email addresses.

Vendor	Vendor #	Contact	Email
Apple	97794	David Lockwood	DLockwood@apple.com
		Danielle Deil	DDeil@apple.com

Justification Process
iPad purchase for administrative, business, and educational use will go through a justification and approval process first.

In each case you will be asked to explain the reason for the purchase. This is to ensure that the iPad is the appropriate tool for the intended use (many District applications DO NOT run on an iPad).

iPads are tablets, not computers. These are not substitutes for more versatile laptop computers and should not be purchased as such. Note: only wifi enabled iPads are acceptable, 3G/4G models are NOT to be purchased.

When Justification is REQUIRED:
Written justification must be provided for all business, administrative, teaching, and learning purposes. Justification must include the following components:
1. How will the iPad be used?
2. Who will use the iPad?
3. What applications will be used?
4. How will software (apps) be purchased?
5. Who will be responsible for updating the device?
6. How will maintenance, service, and warranty be provided?
7. Is wireless access available where the iPad will be used?
8. Why can't a laptop be used to accomplish the same tasks?

When Justification is NOT REQUIRED:

Page 1 of 2

Updated: 2020-02-11

iPads purchased with grant funds, donations, or through ESE do not require justification. Apple equipment purchased for the Morning Show, such as replacements, do not require justification.

District Applications that DO NOT currently work on iPads:
The following are current applications that do not work (this is by no means an exhaustive list of all District applications as all school based software has not been tested)

- Lawson financial
- Lawson Global HR
- Lawson Employee Self-Service
- E-Reports
- Destiny Book Software
- Safenet Sign-in System
- WebTMA
- Microsoft Office
- Pearson Test NAV (Online Assessment)
- Adobe Flash
- FASTT Math
- Riverdeep
- Earobics

Mobile Device Management
Apple iPad purchased from Education Sales require registration on the District's Jamf PRO MDM system. Send an email to Art Mickelson <art.mickelson@sdhc.k12.fl.us> with the Apple Sales Order Number for iPad serial numbers to enroll the devices. Mr. Mickelson will provide serial number list for the iPads if ordering cases from Rug-Ed. Email the list of serial numbers received from Art to amyk@rug-ed.com, please include the PO number of the case order. This registers the iPad with Rug-Ed for warranty purposes.

iPad Case (Rug-Ed Prolock iPad Case and accessories):

Company	Contact	Email
Rug-Ed-V#202002	Ralph Schiller	ralph.schiller@rug-ed.com
	Amy Kaiser	amyk@rug-ed.com

ITEM LAWSON #	DESCRIPTION	Price
3027613	iPad Air/Air2/Pro 9.7/5th Gen ('17)/6th Gen ('18) with 3 year iPad Repair Coverage with a clear back and locking case	$69.00 ea
3027614	**iPad Mini 4** with 3 year iPad Repair Coverage with a clear back and locking case	$69.00 ea
3030151	iPad Gen 7 – 10.2" Case	$69.00 ea
3027615	Tempered Glass Screen Protector	$100.00/25pcs
3027616	Detachable Stand	$50.00/25pcs
3027617	Carrying Strap	$50.00/25pcs
3027618	USB to Lighting Charging Cable (3ft & 6ft)	$100.00/50pcs
3027619	USB Wall Charging Adapter	$100.00/20pcs

NOTE: Please use object code 519 for iPad cases

APPENDIX H

Hillsborough County
PUBLIC SCHOOLS
Excellence in Education

Employment Understanding – Restricted Appointment
Current Permanent Employee

Employee Name: _____

Employee Identification (EID) Number: _____

School Year: _____ Work Site Name: _____ Site Number: _____

I have been offered, and I accept a **restricted appointment** as _____
(enter job classification). I understand this assignment will end on the last day of the current regular school year unless another specific date is designated by District policy.

If this assignment ends prior to the end of the school year, I may be subject to an administrative placement until such time as a pool placement opportunity can be made.

It is my responsibility to clarify my employment status prior to signing this document.

Signature: _____ Date: _____

SB70116
Distribution: Principal/Site Administrator
Employee
Human Resources, Department Representative/Personnel File

H:\\Employee Relations Work Folder\FORMS\Restricted Appointment - Curr Perm Emp.doc

Employment Understanding – Restricted Appointment
New Hire or New Appointment

Employee Name: _____

Employee Identification (EID) Number: _____

School Year: _____   Work Site Name: _____   Site Number: _____

I have been offered, and I accept, a **restricted appointment** as _____ (*enter job classification*). I understand that this assignment will end on the last day of the current regular school year unless another specific date is designated by District policy.

I will be entitled to the benefits associated with permanent full-time employment (leave accumulation, health insurance, retirement credit, etc.) upon satisfaction of the established waiting period for eligibility. At the conclusion of this restricted assignment, I have no entitlement to continued employment in this or any other classification. I understand the School Board shall not be obligated to offer continued employment or to take any action to end this assignment since this assignment shall, of its own force, terminate as noted in the paragraph above. I understand, however, that I may make application for, be offered, and accept employment in any other position for which I qualify. The District's adopted salary schedule and placement procedures will apply to me when I am processed for employment.

It is my responsibility to clarify my employment status prior to signing this document.

Signature: _____   Date: _____

SB70115
Distribution: Principal/Site Administrator
                       Employee
                       Human Resources, Department Representative/Personnel File

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APPENDIX I

Community Partnerships in Hillsborough County Public Schools (HCPS)

HCPS recognizes that the district cannot work in isolation. External partners are critical to helping the district address our Strategic Priorities and realize our vision of Preparing Students for Life. Individual schools may also interact with our partners to enhance and improve the quality of education for our students, strengthen the parent-school relationships, encourage parent involvement, promote student equality, and help achieve the highest level of success within and outside the classroom.

AnnMarie Courtney, Director of Partnership Engagement, has been designated by the Superintendent as the district liaison for all partnership agreements initiated by school or district personnel. If an external partner needs guidance Ms. Courtney will advise on the most appropriate instrument for the proposed partnership, and will provide technical assistance as needed. Ms. Courtney can be reached at AnnMarie.Courtney@hcps.net or (813) 272-4438.

Contractual Relationships: Whether a third party is providing actual services or only an in-kind contribution, that relationship should be formalized if the third party and/or its employees will be providing **direct services** to HCPS students. Examples of direct services may include tutoring, mentoring, field trips, summer programs, before and after school programming, etc. Based on the type of relationship with the third party, a different document may be required to formalize that relationship (see below).

If an individual or organization wants to:	Take action by:
Receive student data/information maintained by the school district, with parent/guardian permission (see sample parent consent)	Developing a Data Sharing Agreement: Sample Data Sharing Agreement Sample Parent Consent
Conduct a research project in district schools	Submitting a Research Proposal Request form to the Assessment and Accountability Department.
Fulfill obligations related to a specified project, whether related to a grant or not	Working with the appropriate district division to develop a Memorandum of Agreement (MOA) and present it to the School Board for approval. The type of MOA will differ based on whether or not funds will be exchanged. MOA instructions and templates for are located in the district's Business News site.
Provide before or after school programs for students, regardless of where the services will be provided	Contacting Michael McManus, the Supervisor of Out of School Time, at Michael.McManus@hcps.net or (813) 744-8941, extension 306.

Provide summer school programming on a school campus when the provider is a current district employee	Contacting Adriane Sykes, the Supervisor of Community Education, Fees, and Special Programs, at Adriane.Sykes@hcps.net or (813) 231-1671.

Partnership Continuum:
Hillsborough County Public Schools is committed to increase partnership engagement throughout the district. The district provides a variety of ways for an individual, organization, or business entity to collaborate with the district/school. Procedures have been implemented to allow for the review of such interest including non-fee and fee based proposals, school fundraisers and information/flyer distribution (see below).

If an individual or organization wants to:	Take action by:
Distribute information (flyer, letter, etc.)	Accessing Guidelines to use Peachjar-Eflyer System. Peachjar is a state of the art electronic flyer delivery system to communicate with families in a paperless environment. All flyers are reviewed for posting to Peachjar.
Interact with HCPS in a grant-funded project.	Notifying Grants and Research Operations (GRO) via email Lisa.Placko@hcps.net or phone (813-272-4880).
Interact (time, talent, treasures) with a school/district site at **NO-COST**	Accessing the Partners in Education information on the District webpage
Implement partners' grant-funded activities	Submitting a proposal to the District Review Committee.
Interact (time, talent, treasures) with the school/district site that involves a **FEE**	Submitting a proposal to the District Review Committee using the Fee-Based form.
Use a district facility	Following guidelines published in the district's Business News site.
Volunteer or mentor HCPS students	Contacting the HCPS Office of Volunteer Services, and completing the required volunteer application.
Engage in fundraiser activities that meets the minimum of 40% return to school/district.	Registering as a vendor on the VendorBid website. Must include copy of insurance and the organization must and comply with the BACKGROUND CHECK. See Jessica Lunsford Act Compliance.

APPENDIX J

Date

(Organization's Full Mailing Address)

Dear (Organization Contact Person):

I am writing this letter in support of the (Grant Project Name) project being developed by (Full Name of Grant Applicant) for (time frame). The purpose of the project is (Insert purpose here – i.e., "to improve academic achievement of students via training for teachers that promotes exemplary science instruction").

(In paragraph 2, provide a brief summary of the project design that you are proposing. Describe the organization's relationship with HCPS and provide details as to how HCPS has successfully partnered with the organization in past projects.)

(In paragraph 3, articulate the specific commitments HCPS is expected to make to the implementation of the proposed project should it be selected or funding.)

On behalf of Hillsborough County Public Schools (HCPS), I wholeheartedly endorse this project. I urge you to give this proposal your full consideration, as it will support our district's vision of *Preparing Students for Life*. (Modify this closing paragraph to align with your proposed project, i.e., alignment with your organization's vision or mission, etc.)

Sincerely,

Addison G. Davis
Superintendent of Schools