



# MORAINE PARK TECHNICAL COLLEGE

Department of Institutional Effectiveness  
Grants Office

## Grant Process Overview

**Discuss Project with Immediate Supervisor.** The first step in developing a grant application at MPTC is to discuss the potential project with your supervisor and how it aligns with the strategic goals of your unit and the College.

**Complete the Grant Concept and Investigation Approval Form.** Once you have the approval of your immediate supervisor, complete the [Grant Concept & Investigation Approval Form](#). MPTC grant related forms are on the Portal > Employee Tab > List of Common Employee Forms > and begin with the word “grant.” Please use *ONLY* this source for forms to make certain you are using the current form. Use of incorrect forms may significantly delay the processing of your proposal. Feel free to contact the Grants Office for help in accessing and completing the form.

Figure 1: Finding MPTC Grant Related Forms

The screenshot shows the MPTC portal interface. At the top, there is a navigation bar with 'Home', 'Employee', 'Faculty', 'Prof Dev', 'Student', 'Student Life', 'Services', 'About MPTC', and 'Customize Me'. The 'Employee' tab is selected. Below the navigation bar, there are several tabs: 'Employment Details', 'Employee News', and 'Common Employee Forms'. The 'Common Employee Forms' tab is selected, and a sub-link 'List of Common Employee Forms' is circled in red. Below this, a list of forms is displayed. The 'Grant Concept & Investigation Approval' form is circled in red. To the right of the list, there is a box with the following text:

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**Grant Process Overview**

**Figure 2: Sample Portion of Grant Concept & Investigation Approval Form**

MORAINE PARK TECHNICAL COLLEGE		Concept & Investigation Approval Form		
<i>Form is due to the Grants Office a minimum of 30 days before grant due date.</i>				
Accountable Unit Leader (VP): (check only one)	<input type="checkbox"/>	Barrett	<input type="checkbox"/>	Broske
	<input type="checkbox"/>	Kasubaski	<input type="checkbox"/>	Richards
Name of Grant Developer:				
Contact Information for Grant Developer (phone & email):				
Continuing grant?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Funding Source (if known):				
Grant funding period:				
College match required:	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
If yes, %:	_____			
Grant Title:				
Brief summary and justification:				
Projected # participants served (existing/new)	_____ / _____			
College Strategic Priority (check at least one):				
	<input type="checkbox"/>	Build a supportive culture to make us an employer of choice		
	<input type="checkbox"/>	Improve student success through innovative programming, delivery, and services		
	<input type="checkbox"/>	Strengthen our K-16 and community connections		
	<input type="checkbox"/>	Advance the efficient and effective use of technology		
Financial impact (Projected revenue/FTE generation/cost savings):				
Plan to Sustain?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No

Complete these lines.

please expand these cells vertically for additional space

Explain how this opportunity benefits MPTC and students.

Sustainability, especially of new positions, is increasingly important.

**Figure 3: Sample Portion of Grant Concept & Investigation Approval Form**

Because the form is an Excel spreadsheet calculations are automatic; do not alter formulas. Please use the second tab at the bottom of the file if you need to describe more than two personnel positions related to the proposed project.

Proposed Budget		Use whole dollars only					
		General funds ( % )		Grant Funds ( % )		Totals	
PERSONNEL		Salary	Benefits	Salary	Benefits	General funds	Grant funds
Job Title*:						\$0	\$0
New hire?	<input type="checkbox"/> Yes <input type="checkbox"/> No						
Existing staff? Name:							
Same hours?	<input type="checkbox"/>	Expanded hrs?	<input type="checkbox"/>				
Intend to transfer to general college fund at end of grant?	<input type="checkbox"/> Yes <input type="checkbox"/> No						

\* Complete a College Initiative for: 1) any new grant and/or personnel new to grant funding, or 2) personnel coming off of a grant, requiring general fund dollars.

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3-5 job titles

Tip!

### Grant Process Overview

Work with your immediate supervisor to determine who needs to be made aware of the grant proposal, and enter those persons' names at the end of the form. Be sure to include all those who may be impacted. For example, if a new position is planned, that person would need office space, a phone, computer, etc.

Figure 4: Sample Portion of Grant Concept & Investigation Approval Form

Signatures (type name, check box, and type date) (for approval to pursue grant initiative)			
Position	Name (type name & check box to represent signature)		Date
Grant Developer	ABE Faculty	<input checked="" type="checkbox"/>	9.17.18
Immediate Supervisor, if applicable	Pete Snyder	<input checked="" type="checkbox"/>	9.18.18
Dean, if applicable		<input type="checkbox"/>	
***Director of Facilities, if applicable	Roy Marquez	<input checked="" type="checkbox"/>	9.18.18
Unit Vice President (Please present this information to President's Cabinet as needed.)	Jim Eden	<input checked="" type="checkbox"/>	9.19.18
President (required for NEW applications)	Bonnie Baerwald	<input checked="" type="checkbox"/>	9.20.18
Grants Office:	Pete Rettler	<input checked="" type="checkbox"/>	9.20.18

Email those who need to approve the concept. Save the completed Form in the Grant Managers shared drive (Y:\Grant Managers\grants in process [grant manager's last name]) and send an email to the signatories designated on the Form (with a cc to Grants Office personnel). Include instructions in the email to review the form, check where indicated, and save (in that same folder). We strongly recommend providing a short time frame for review and approval. **DO NOT email the form as an attachment.** Keep all files related to the grant application in this same folder. When files are attached to an email, they can be modified and saved in different locations, resulting in different versions containing different content. Keeping all files in the same location helps to prevent this issue.

Figure 5: Sample Email for Grant Concept & Investigation Approval

Send

To... Bonnie Baerwald; Jim Eden; Roy Marquez; Brenda Raad; Peter Snyder;

Cc...

Subject My Great Grant Idea

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Dear Favorite Supervisors of All Time,

I have a really cool idea for a grant that will bring in tons of money and FTEs.

Please click on this [link](#) to see the Grant Concept and Investigation Approval Form. If you approve, all you have to do is click on the box next to your name in the form, fill in the date and save. Please respond to this email within three days confirming your approval.

Sincerely,

ABE Faculty



Jump to:

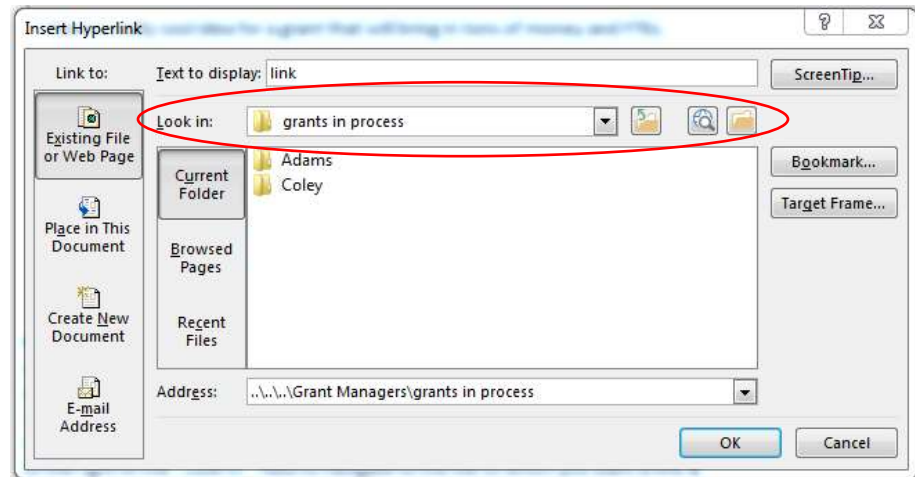
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Note the blue [hyperlink](#) in the email above. These links make it easy for recipients of your email to find and open files, and help to ensure that files are saved back in the same location from which they originated. To create a link like this, start by highlighting the word(s) you want to be a hyperlink. In this case, it was the word “link.” Right-click that word(s), choose “Hyperlink...”

and then use the pick arrow or folder icon to the right of the “Look in:” field to navigate to the file to which you want a link. Click on the file to which you want a link, and click on “OK.”

Figure 6: Inserting a Hyperlink



After sending the email, (even if you asked others to notify you when they sign off), the Grants Office recommends that you check the Form frequently to see when all signatories have actually completed it. Notify the Grants Office by email promptly upon completion (all signatures obtained) of the Grant Concept & Investigation Approval Form.

**Begin work on the grant application.** You may start work on a grant application at any time with supervisory approval, but understand that permission to submit a final proposal has not yet been granted. You will eventually complete and save a draft of the actual grant proposal (and any related documents) in the same folder as the Form. Grants Office staff can assist you in writing the proposal.



**Review the guidelines.** Begin the process of writing the grant application by *thoroughly* reviewing the grant guidelines. There are many different types of grant applications, but this guide will focus on Wisconsin Technical College System (WTCS) grant applications. WTCS grant guidelines are filed by category in the MPTC grant managers shared drive. It is crucially important to follow every instruction in the guidance *exactly*. Many grants are becoming increasingly competitive, and in the past decade, a number of federal awards have been decided by a fraction of a single point.

To make it easier to review the differences between the current and prior WTCS grant application guidance, the Grants Office places a document in the shared drive that highlights these changes. Information that will be of interest is in yellow highlight. A change summary is also saved in each category.

**Use the correct form(s).** WTCS application forms are in the grant managers folder. New since 2016-17 is a separate Excel budget. Use **ONLY** these application forms. Applications submitted on incorrect forms may be rejected. The prior and current year’s grant applications are in the ‘funded grants’ folder, but if you have misplaced your copy including the budget and need another, please contact the Grants Office.

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**Personnel Costing.** If your proposal involves personnel, Human Resources needs *at least* one-week advance notice to prepare their portion of a “Grant Personnel Costing Worksheet” (PCW). Obtain a copy of the PCW from the Portal > Employee Tab > List of Common Employee Forms >. There are a few things to keep in mind about the PCW. Note that the grant manager completes only a very small portion of this form, as indicated by the color coding on the key. In addition, note that at the bottom there are tabs for “Existing Position” and “New Position.” You will need to complete one PCW for each *new position*, and for each *existing person*. Save these forms in the same folder as the Concept Form, and email the Grants Office that they are ready. The Grants Office will work with Human Resources to complete the forms, and will notify you when they are complete so that you can complete the budget portion of the grant application.



**Figure 7: Sample Portions of Grant Personnel Costing Worksheet**

**Moraine Park Technical College**  
**Personnel Template for Grants**  
**Existing Position**  
Grant year of July 1 - June 30

Position Title: [Redacted]

Position Number: [Redacted]

Employee Name: [Redacted]

Current Distribution: [Redacted] % to FOAPAL  
[Redacted] % to FOAPAL  
[Redacted] % to FOAPAL

Position costing obtained from: [Redacted]  
Date Completed: [Redacted]

**Personnel Costing Worksheet**  
Note: Submit to Grants Office one week in advance of when you need information

**Employee Name**

to be completed by Grants Office ONLY

to be completed by Human Resources ONLY

to be completed by grant proposal author calculated field

• Also complete a College Initiative for:  
1) any new grant and/or personnel new to grant funding, or 2) personnel coming off of a grant, requiring general fund dollars.

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	Grant #1	Grant #2
Position Cost (annual)	100%	100%
Position Cost (hourly)	100%	100%
Grant Title	[Redacted]	[Redacted]
Grant Funded % (xx.xx%)	0.00%	0.00%

**Grant Process Overview**

**Institutional Research.**

If you will need data from the Department of Institutional Effectiveness as part of the application, obtain a copy of the Institutional Research Help Request Form from the Portal > Employee Tab > Employee Tools > [Requests-Institutional Research](#). Note that a four to six week lead time is required, so plan accordingly when developing a grant proposal. Follow the instructions on the form, saving it to your computer, and then submit it as an attachment to an email using the link at the bottom of the form.

**Common issues with WTCS applications.** As previously noted, WTCS application forms nearly always change from year to year. Be certain to use **ONLY** the current version in the grant managers folder.

The abstract is typically limited to 200 words. It is easy to check on the number of words in a Microsoft Word document by highlighting text to select it and then looking at the word count in the lower left part of the window. Be certain to include all required components of the abstract in the guidelines.



The Input to Application section can be very challenging due to the 100-word limitation. It may end up simply being a list. If room allows, include: students/learners, advisory committees, faculty and staff, deans, Vice Presidents, Grants Office, Institutional Effectiveness and others as appropriate, as well as a brief description of the coordination of funding with other sources.

**Figure 8: IR Request Help Form**

**MORAINE PARK TECHNICAL COLLEGE**

**Institutional Research Help Request Form**

*A 4-6 week lead time is required for all requests; exceptions may occur.*

REQUESTOR INFORMATION				
Last Name:	First Name:			
Project Name:				
PLEASE INDICATE REQUEST TYPE:				
<input type="checkbox"/> New	<input type="checkbox"/> Current:			
REQUEST FULFILLS WHICH OF THE FOLLOWING: (CHECK ALL THAT APPLY)				
<input type="checkbox"/> Grant	<input type="checkbox"/> Non-Grant	<input type="checkbox"/> State	<input type="checkbox"/> Federal	<input type="checkbox"/> Non-State/Federal
If Grants, <a href="#">review list</a> & state name:				
TIMELINE (requested due date must fall AFTER submitted work order date)				
Date Submitted: (mm/dd/yyyy)		Requested Date of Completion: (mm/dd/yyyy)		
DESCRIPTION (Please attach a Word document to email if description requires additional details that do not fit in allotted spaces)				
Briefly describe the request and its purpose:				
Briefly describe how the data/findings will be used:				
Identify with whom the data/findings will be shared:				
Identify any other areas within the College that will benefit from the data/findings:				
Will this request be reoccurring?				
<input type="checkbox"/> Yes (please specify):		<input type="checkbox"/> No		
<p><b>Once form is complete, save it and <a href="#">submit here</a> to IR's Track-It! system.</b> You will receive a work order confirmation via email after you send your request. Someone from IR will be assigned your ticket and will contact you, if needed. You will need access to Adobe Pro to open this link. If you don't have access, please use this email address, <a href="mailto:MPTCTrackIR@morainepark.edu">MPTCTrackIR@morainepark.edu</a> to submit your request.</p>				

Moraine Park Technical College - Institutional Research Help Request Form

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### Grant Process Overview

Application Components: Abstract (14); Statement of Need (15); Goals, Objectives, Activities and Evaluation (16) and Overall Monitoring Process (17). The combined total of the application components **should not exceed 10 pages**. Each should be concise and to the point; the Abstract is *limited to 200 words* and the Statement of Need is *limited to 1500 words or less*. Do not reference needs that will not be addressed by the proposal. Remember to describe the need from the students'/communities' point of view—not that of the institution.

Be certain to use data that is as current and as local as possible. If this is a continuing grant, you must include data on effectiveness from previous funding, preferably including that from triannual reports.

Outcomes must be specific and measurable, addressing a need cited above. Every activity must be reflected in both the budget narrative and the evaluation.



Use the table for the evaluation section to be certain that all objectives are being monitored, including a description of data collection and method of evaluation, as well as person responsible. As appropriate to the application, there must be a statement of compliance with triannual reporting, client reporting and posting of curriculum deliverables.

The Standard Financial Report and Budget Narrative must exactly align with information in the abstract, narrative, outcomes and evaluation. Follow the samples exactly as provided in the guidelines.

**Read the WTCS Grant Rubrics.** After you have completed a draft of a WTCS grant application, notify the Grants Office by email. Use the WTCS grant rubrics to assure all areas are addressed for a WTCS application.



Each time the grant proposal draft is revised, please resave the file with the new date and retain all previous versions in the grant managers shared drive. (example: Student Support draft 10.17.18)

**Prepare the Project Development Checklist.** Once you have a completed draft of the grant application and all required materials in the folder on the shared drive that have been approved by the Grants Office, obtain a copy of the Grant Project Development Checklist from the Portal > Employee Tab > List of Common Employee Forms >. Complete the top three lines of the Project Development Checklist (PDC) and save it in the same folder (Y:\Grant Managers\grants in process [grant manager's last name]) with the other documents.

**Figure 9: Sample Project Development Checklist**

 <p>MORAINÉ PARK TECHNICAL COLLEGE</p>	<p><b>PROJECT DEVELOPMENT CHECKLIST</b> <i>Grant Manager: Notify the Grants Office when completed.</i></p>
<p><b>Grant Proposal Title:</b> Click here to enter text.</p>	
<p><b>Funding Source:</b> Click here to enter text.</p>	
<p><b>Point of Contact:</b> Click here to enter text.</p>	

Note: Staff on left need to review and check off on the proposal prior to submittal to the Grants Office.

The Grants Office will route finalized proposal to staff on right side.

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#### Notify your Vice President.

Send an email to your Vice President (VP) with a cc to Grants Office personnel requesting the VP to identify which of the key personnel listed on the PDC (and possibly any others) who will potentially be impacted by the proposal. **DO NOT attach the PDC to the email**—use a hyperlink to provide access to the PDC as described above. Note that persons designated by the VPs are to have a minimum of five days to review the proposal and associated documents. All documents must be finalized at least seven days prior to the grant submission deadline.

After all parties indicated on the PDC have given their approval, the Grants Office will use the right hand side of the PDC to gain final approval from VPs (and the College President for new proposals only).

The Grants Office submits all required proposal documents to the funder. A copy of the final proposal will be emailed to you. The documents that were located in the Grants In Process folder will be removed but retained by the Grants Office as the “official” copies of all draft and final versions of all documents related to the application are kept.

Post-award modifications and reports: submit to the GO for review, routing to VPs for approval, and submittal to the funder.

<input checked="" type="checkbox"/> <b>Accountable VP – NAME:</b> <a href="#">Click here to enter text.</a> <b>Date:</b> enter date. <b>Indicate personnel required to check off (boxes at left and under “Final Grant Review &amp; Approval” column at right)</b>	Checking box below represents your signature
<input type="checkbox"/> <b>Institutional Effectiveness</b> needs the following advance notice: 4-6 weeks for all requests (data, surveys, market research, etc.) (use <a href="#">IR Help Request Form</a> ) (Jacque Warnecke, <a href="mailto:jwarnecke@morainepark.edu">jwarnecke@morainepark.edu</a> , Ext. 3250) - Consulted regarding data needs; reviewed outcome objectives	<input type="checkbox"/> Date: Click to enter date.
<input type="checkbox"/> <b>Human Resources</b> consulted regarding positions (needs 1 week advance notice; submit <b>Personnel Costing Worksheet to GO &amp; save the finalized worksheet in the Grant Managers folder</b> ) (Paula Stettbacher, <a href="mailto:pstettbacher@morainepark.edu">pstettbacher@morainepark.edu</a> , Ext. 3232)	<input type="checkbox"/> Date: Click to enter date.
<input type="checkbox"/> <b>Information Technology</b> consulted regarding technology needs (Christine Kuhaupt, <a href="mailto:ckuhaupt@morainepark.edu">ckuhaupt@morainepark.edu</a> , Ext. 3326)	<input type="checkbox"/> Date: Click to enter date.
<input type="checkbox"/> <b>Finance Office</b> consulted regarding budget (Tara Wendt, <a href="mailto:twendt4@morainepark.edu">twendt4@morainepark.edu</a> , Ext. 3236)	<input type="checkbox"/> Date: Click to enter date.
<input type="checkbox"/> <b>Facilities</b> consulted regarding space needed (Roy Marquez, <a href="mailto:rmarquez3@morainepark.edu">rmarquez3@morainepark.edu</a> , Ext. 2136)	<input type="checkbox"/> Date: Click to enter date.

<b>Final Grant Review &amp; Approval</b>	Checking box below represents your signature	To be completed only after all signatures are obtained on the left side.
<input type="checkbox"/> Bonnie Baerwald (new proposals must have President approval)	<input type="checkbox"/> Date: Click to enter date.	Comments: Click to enter text.
<input type="checkbox"/> Kathy Broske	<input type="checkbox"/> Date: Click to enter date.	Comments: Click to enter text.
<input type="checkbox"/> Jerry Richards	<input type="checkbox"/> Date: Click to enter date.	Comments: Click to enter text.
<input type="checkbox"/> Carrie Kasubaski	<input type="checkbox"/> Date: Click to enter date.	Comments: Click to enter text.
<input type="checkbox"/> Jim Barrett	<input type="checkbox"/> Date: Click to enter date.	Comments: Click to enter text.

## Grant Process Overview

### Additional information to help you develop grant applications and to manage grant awards:

- **Calendars** of due dates can be found in two locations:
  - Outlook (*MPTC Grants*). You can easily open this calendar next to your own, and slide over any of the deadlines that you would like on your calendar. You should have received an invite for the initial deadlines to our office as well.
  - Data & Grants channel of the portal contains a calendar that is updated frequently throughout the year.
- **Meetings** to begin preparation of your proposal may be scheduled by the Grants Office, but please begin developing your application(s) so that you can discuss any questions and your draft with Grants Office personnel. After you are awarded a grant, you will be required to meet with Grants Office and Finance personnel to monitor grant outcomes, activities, and expenditures.
- **Boilerplate** information can be found in the grant managers shared drive as well ([click here](#)).
- **Webinars** for the WTCS grant guidelines are typically held in October. You will receive an invite after the dates are announced.

Special note to grant managers: There are staff carrying out grant activities who are not grant managers and therefore do not have access to these materials on the Grant Managers shared drive. Please be certain to share these materials with others as appropriate.

#### CONTACT INFORMATION:

- |                                       |                |  |
|---------------------------------------|----------------|--|
| ▪ James D. Huycke, Grants Coordinator | (262) 335-5784 | <a href="mailto:jhuycke@morainepark.edu">jhuycke@morainepark.edu</a> |
| ▪ Jackie Jarvis, Grants Coordinator   | (262) 335-5801 | <a href="mailto:jjarvis@morainepark.edu">jjarvis@morainepark.edu</a> |
| ▪ Sue Wiese, Grants Specialist        | (920) 924-3230 | <a href="mailto:swiese@morainepark.edu">swiese@morainepark.edu</a>   |

Please see the general overview document on the next page or the complete [Development & Management guide](#) on the Data & Grants channel of the portal for further information.

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Grant Process Overview



# Grants at MPTC... easy as 1, 2, 3!



## 1. GET READY...

### Grant Concept and Investigation Form

- Discuss the idea with your supervisor
- Align project with unit and College strategic goals
- Receive formal approval from your VP
- Complete GC&I Form *at least 30 days before due date*
  - Include basic info, FTE projection, draft budget
- Save the form in the Grant Managers shared drive
- Inform relevant parties of the need to sign promptly
- Notify the Grants Office when all signatures are complete

*But you are not done yet...*

## 2. GET SET...

### Start Project Development Checklist (left side)

GC&I form approval grants permission to start an application process

- Complete (but do not submit) the grant application *at least 7 working days before due date*
- As appropriate, contact Curriculum, Facilities, Finance, HR, IR, IT, SHMPI, etc. (Note: some require six weeks advanced notice!)
- Complete required documents (e.g., Personnel Costing Worksheet)
- Save the documents in the Grant Managers shared drive
- Prepare Development Checklist for your VP
- VP indicates personnel required to approve (left & right side both)
- Notify personnel on left that Checklist is waiting for their approval
- Notify the Grants Office when signatures on the left are done

*Almost there...*

## 3. GO!

### Finish Project Development Checklist (right side)

Now the VPs approve (and the President if a new proposal)

- After all approvals are granted above, notify the Grants Office
- Grants Office contacts VPs (and possibly the President) to approve
- After all VPs/President approve, Grants Office submits

*Done!*

And please remember...

**ALL** grant applications, programmatic reports, fiscal reports and progress reports  
**REQUIRE** approval *before* submission by the Grants Office!

Please see the  
Grant Development and Management Guide at: Portal/Employee Tab/Data & Grants Channel  
for complete information.