



You got the grant,
now what?



Agenda

- Award Management
- Programmatic Compliance
- Fiscal Compliance
- Setting Up Grant Files
- Grant Monitoring
 - Internal
 - External
- Wrap Up/Lessons Learned

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Award Management



Award Management

- Get organized
 - There is no such thing as free money
 - Determine requirements for programmatic and fiscal compliance
- Project kick-off meeting
 - Establish roles and responsibilities of all team members
 - Grants management vs. Project management

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Award Management

- Grants Management
 - Statutory and regulatory compliance
 - Oversight and technical assistance for staff to ensure statutory and regulatory compliance
 - Establish and maintain grant files
 - Process invoices
 - Submit required reports (quarterly, close-out)

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Award Management

- Project Management
 - Day to day implementation of the project
 - Achieving the goals/objectives of the grant
 - Statutory and regulatory compliance
 - Expending funds in line with grant requirements
 - Provide information to Grant Manager as needed for reporting
 - Regular communication with Grant Manager

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Programmatic & Fiscal Compliance



Programmatic Compliance

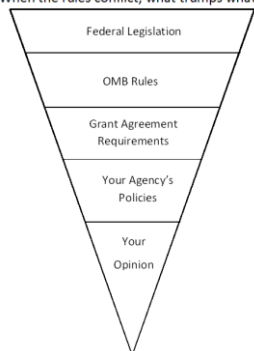
- Document program activities and expenditures
- Ensure timely submittal of performance reports
- Review award documents for additional responsibilities
- Ensure that program staff understand the grant requirements (statutory and regulatory compliance)

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Programmatic Compliance

When the rules conflict, what trumps what?



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Fiscal Compliance

- Timely and appropriate expenditure of grant funds
- Timely submission of fiscal reports
- Ongoing coordination between fiscal and program staff

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Grant Files



Grant Files: Programmatic

- Grant solicitation
- Grant application
- Grant award notifications
- Scope of services and any modifications
- Correspondence
- No-cost extension notices
- Reports
- Documentation of project performance
- Inventory list of grant funded equipment

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Grant File: Fiscal

- Grant application with budget
- Grant award notifications
- Program/budget modifications and no-cost extension notices
- Record and documentation of all grant expenditures
- Fiscal reports

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Monitoring



Internal Grant Monitoring

- Monitoring activities should check for the following:
 - Regulatory and statutory compliance
 - Fiscal and programmatic compliance
 - Identification of potential problems
 - Corrective actions (if needed)
- Single Audit Requirement: O.M.B. Circular A-133

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External Grant Monitoring

- Conducted by the granting agency
 - Regulatory and statutory compliance
 - Fiscal and programmatic compliance
 - Identification of potential problems
 - Corrective actions/Findings
- Audit vs. Monitoring Visit

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Top 3 Lessons Learned

- #1: Internal and external communication is key
- #2: Regular upkeep and maintenance of grant files
- #3: No such thing as too much documentation

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