



City of Richmond GRANT PROCEDURES MANUAL



Introduction

Welcome to the Grants Manual, a comprehensive and vital resource that is your key to unlocking the information and guidance you need to succeed in securing and managing grants. This manual is not just a resource but a crucial tool that empowers you with the knowledge and skills to navigate the grant landscape confidently. Your role in this process is invaluable, and this manual is designed to support and guide you every step of the way.

Securing grant funding is a challenging and competitive endeavor. However, with the proper knowledge, skills, and resources, you can significantly increase your chances of success. The Grants Manual provides unwavering support, guiding you every step of the way and instilling the confidence to achieve your program and project goals. You are not alone in this journey; this manual is your reliable companion.

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Grant Management Process

Navigating the Grant Management Process in Twelve Steps:

1. **GRANT AWARENESS:** Share program or project idea(s) and grant funding needs with the Grants Team at AskGrants@rva.gov.

2. **GRANT RESEARCH:** Use eCivis to begin searching for grants. eCivis is the City of Richmond's primary grant search engine.

3. **GRANT WRITING:** Compile the grant application using the Notice of Funding Opportunity (NOFO).

4. **PERMISSION TO APPLY:** The Grants Team confirms eligibility and capacity to apply for grant funding and will formally give the green light to apply.

5. **INITIAL REVIEW:** Email the Grant Review Authorization Form* and Grant Application to the Grants Team at AskGrants@rva.gov for review and approval.

6. **CAO REVIEW & SIGNATURE:** Email the CAO Grant Cover Sheet, Grant Authorization Form, and the Grant Application to CAO-Office@rva.gov.

7. **ORDINANCE & RESOLUTION:** The department participates in the O&R process for new grant funding and any funding variances from the requested amount.

8. **GRANT ACCEPTANCE:** Email the Grant Award Letter to CAO-Office@rva.gov and AskGrants@rva.gov for review and signature.

9. **GRANT SET UP:** Refer to the Department of Finance (DOF) Grant Setup Checklist.

10. **SAVING THE GRANT:** Upload and save the Grant Application to eCivis.

11. **BEGIN PROJECT OR PROGRAM:** Begin the project or program and refer to the terms and conditions throughout the grant's life.

12. **GRANT CLOSEOUT:** Refer to the Grantor's Terms and Conditions and the DOF Closeout Instructions. To officially close the grant, email DOF at Finance@rva.gov.

**Documents enclosed or linked in the Grants Procedures Manual.*

“Don’t wait for the right opportunity, create it.” ~ **George Bernard Shaw**

Grant Awareness

Grant awareness is a powerful tool that equips organizations with the understanding and knowledge of available grants, particularly funding opportunities for various projects, programs, and research. It empowers you to access financial resources, advance your goals, and positively impact your respective departments.

A. Program Assessment

To secure grant funding for your department, it's crucial to start by identifying a program or project that requires funding. Think strategically about your department's goals and objectives and develop new projects or expand existing projects that your department could undertake with additional resources. Consider the areas where programs need improvement or where there are waiting lists for services. Collaborate with your team members or other city departments to generate ideas for program enhancements and identify the resources that you need to achieve them. Gather information on the initiative, such as existing models, evidence-based programs, and statistics, to support the need for the project. Having robust data to support your request can make a big difference in getting a grant award. Summarize your ideas, the program, and its requirements in writing to prepare a proposal for grant funding.

Municipalities often struggle to receive grant funds as independent entities when applying for competitive grants. Grantors typically prefer to fund partnerships and collaborative projects, as these can significantly strengthen grant applications for several reasons:

- Enhanced Expertise
- Increased Credibility
- Broader Reach and Impact
- Mitigation of Risks
- Strengthened Evaluation Plans
- Support Sustainability
- Alignment with Funder Priorities

Collaborations combine diverse strengths, resources, and perspectives to develop more comprehensive and impactful grant applications. Utilizing collaborators' collective expertise and resources can enhance your competitiveness and increase the likelihood of securing project funding.

As your department outlines the program's scope, create a list of potential project partners. This list should encompass all organizations with which your department has ongoing relationships or has shown interest in collaborating. These organizations may include other city departments, not-for-profit agencies, community-based organizations, universities/colleges, local businesses, regional organizations, or civic groups.

STOP - Contact the Grants Team in the Budget and Strategic Planning Department at AskGrants@rva.gov to share your program or project idea and grant funding needs.

B. Grant Research

Grant research can be frustrating and time-consuming, but various resources are available to help locate grant opportunities. The COR subscribes to two primary resources:

- **eCivis:** The City of Richmond has a contract with eCivis, a grant search engine. eCivis helps find the latest federal, state, and private funding opportunities and sends regular updates on new and updated grant opportunities. Grant seekers can use "keywords" to search for a specific program or project. eCivis is accessible on the internet at www.eCivis.com. Each department needs to designate a point of contact (POC). The Grants Team will grant access to eCivis with a single sign-on. The Grants Team will provide eCivis training.

eCivis users can research and save grant funding opportunities, create workspaces for interdepartmental collaborations, subscribe to grant notices and updates, create reports, and so much more.

- **Grants.gov:** Departments can use <https://grants.gov/> to find and apply for competitive grant opportunities from federal agencies. Register at <https://grants.gov/applicants/applicant-registration> to subscribe, set up a profile, and get automatic email alerts for relevant federal grants. You will need the City of Richmond's Identification Numbers to register. Refer to pages 9-10 or email AskGrants@rva.gov for assistance.

Grants.gov users can research and save grant funding opportunities, subscribe to grant notices and updates and apply for grant funding. The Grants Team can create workspaces for interdepartmental collaborations.

- **Additional Grant Search Resources:**
 - [Office of Justice Programs \(OJP\) Current Funding Opportunities](#)
 - [Office on Violence Against Women \(OVW\) Open Solicitations](#)
 - [Office of Community Oriented Policing Services \(COPS Office\) Grants](#)
 - [Grants | Virginia Department of Criminal Justice Services](#)
 - [The Grant Portal](#)
 - [Grant Watch](#)

C. Eligibility Requirements

Before applying for grant applications, it is essential to review the eligibility requirements. Since grants can take over 100 hours to complete, it is recommended that you consider forming a team to assist with preparing and writing competitive grants.

- **Eligibility Review Process #1:** Once the department identifies a prospective grant, contact the Grants Team before moving forward to review the grant's Notice of Funding Opportunity (NOFO) or Funding

Opportunity Announcement (FOA), the Request for Proposal (RFP), and the application package. Ensure the department is eligible and meets all the grant's requirements, including match requirements. Review the grant deadline and ensure the department can make a timely submittal. Click the link to learn more about [Grant Eligibility](#).

- **Eligibility Review Process #2:** Review any unknown grant terms in the [Glossary of Grant Terms](#) and the key terms included in this grant's manual.
- **Eligibility Review Process #3:** Review the grantor's unique conditions. These conditions outline specific requirements that must be met to comply with grant requirements.
- **Eligibility Review Process #4:** Review the funding organization's website, mission, and prior grant award recipients. Grantors, whether federal or nonfederal, fund projects that further their mission. Funding objectives can be found in Program Announcements (PAs), Requests for Grant Applications (RFAs), Requests for Proposals (RFPs), and annual reports. The department's proposal should support the organization's mission and the purpose of the grant, as presented in the solicitation.

D. Obtain Permission to Apply for the Grant

Approval from the Grants Team is required to start the grant writing process officially. The Department Directors must formally submit the Grant Authorization Form to the Grants Team for approval. The Grants Team will notify all parties of the following:

- Duplicate interests of the same grant funding opportunity
- Inability to provide an in-kind or cash match
- Capacity to successfully submit a competitive application
- Unalignment with strategic goals

Grant Writing

Grant writing is crafting proposals to secure funding from grant-making organizations, government agencies, foundations, or other funding bodies. It involves creating a persuasive and well-researched document that outlines the project or program for which funding is sought and demonstrates why it deserves financial support. While success is not guaranteed, thorough preparation and a well-crafted proposal can significantly increase the chances of securing funding.

It can be challenging for independent organizations to secure grant funds in the present times. Collaborative partnerships within the community are gaining more importance to the community and the grantors. Being timely and involving community partners in the grant writing and review processes is recommended. The department may need to establish partnerships and agreements to apply for grants. It is crucial to define the roles in collaborative grant efforts. One way to achieve this is by using a

Memorandum of Agreement (MOA) or a Letter of Agreement (LOA). Here is an example of a [Memorandum of Understanding](#).

If you require any letters of support or commitment for your proposal, please ask for them. We have provided some sample letters of support for your reference. Please remember that a detailed commitment letter can significantly increase the chances of funding your proposal. A well-crafted letter of support should accomplish most, if not all, of the following goals:

- Acknowledge the importance and potential impact of the proposal.
- Express confidence in the applicant's ability to complete the proposed work.
- Provide specific examples of how the proposal aligns with the objectives of the funding organization.
- Explain how the proposal aligns with the broader goals of the field or industry.

Appendices B and C provide examples of a sample letter of support or a letter of support template. The documents can also be found on [StarNet](#) under City Administration, Budget and Strategic Planning Home, Grants.

If you still need to, research to gather the statistics and data required for your grant proposal to demonstrate the need effectively. Utilize these statistics to make a compelling argument for why the City of Richmond should receive the grant funds.

1. The resources below contain statistics and links for Richmond and Virginia.
 - [Regional Data & Analysis | Richmond Fed](https://data.oecd.org/)<https://data.oecd.org/>
 - <https://datausa.io/profile/geo/richmond-va>
 - <https://cor.maps.arcgis.com/home/index.html>
 - <https://www.census.gov/quickfacts/richmondcityvirginia>
 - <https://www.census.gov/programs-surveys/acs/data.html>
2. When incorporating statistics in your grant application, be sure they are appropriately referenced. Below is a downloadable guide to referencing statistics using several different reference styles:
 - [APA Formatting and Style Guide \(7th Edition\) - Purdue OWL® - Purdue University](#)
 - [Free Citation Generator - APA, MLA, Chicago | Grammarly](#)

Write the grant proposal and budget documents. There is no substitute for a good idea, but a successful grant application is an excellent exercise in communication. It does take time, so adjust your schedule. Keep in mind that writing the application text is only half the work. The rest is assembling budgets and other required documents.

Allow at least four to six weeks for a comprehensive grant application. Ensure the Grants Team and Chief Administrative Officer reviews are completed seven to ten business days before the due date.

Review the [Grant Writing Dos and Don'ts](#) as you go! Leave the Table of Contents (if applicable) and the abstract to write last.

A. Writing the Narrative

- Adhere to the grantor's requirements on format, length, and elements to be included. Failure to do so can result in not being awarded funds.
- Give the reviewers all the information they need in the format they expect to see.
- Try to get a copy of a successful grant as a model.
- Think about the short-term vs. long-term outcomes of the grant activities and how the project will produce measurable outputs in service of a larger goal.
- **Tell them what you are going to tell them, and then tell them what you told them. Repeat the same information, ideas, or themes consistently** throughout the proposal. For example, have a section in the methods for each specific aim and repeat the aim verbatim at the beginning of that section. Be sure to use their language!

Write the abstract last as an accurate summary and a grant preview.

B. Writing the Budget

Develop your budget. Be sure to show how the grantor's money will be spent on the needs outlined in your Project/Program narrative or Objective Statement. Show how your budget is reasonable and consistent with your outlined needs. Most grant applications require written justification (budget narrative) for each line item. Be sure to indicate how that item is essential for your grant. It would be best to justify why you need it to implement the project. Detail the costs of your project:

- **Direct Costs are line items or explicit project costs: personnel and the things to carry out the project.** Personnel costs can include salaries, benefits, and consultant fees. Other direct costs include equipment, supplies, travel, and publication expenses. Each cost is listed on a separate line in your budget.
- **Indirect Costs refer to expenses essential for an organization's operation but are not directly linked to a specific project, activity, contract, or grant.** Examples of indirect costs include the time spent processing payroll, planning and brainstorming for a project, and completing procurement for equipment purchases. These costs are also known as administrative and facilities costs (F&A).
- **Matching Funds**, also known as cost sharing or matching contributions, refer to the portion of project costs not covered by the grant award and must be provided by the grant recipient or other sources. Many grant programs require or encourage applicants to provide matching funds to

demonstrate commitment to the project and leverage additional resources. Types of matching funds include cash contributions, in-kind contributions (such as donated goods or services), or a combination of both. The grant guidelines will specify which types of contributions are eligible for matching. Collaboration with other organizations and stakeholders can be valuable in identifying and leveraging matching fund opportunities.

The [Department of Justice \(DOJ\) Financial Guide](#) and the [Code of Federal Regulations](#) compile laws and regulations governing the financial management and administration of DOJ grants. They can be helpful resources when creating budgets and budget narratives for federal, state, and local grants.

It is important to project your budget as accurately as possible. Underestimating the budget can indicate a lack of understanding of your project. On the other hand, padding the numbers or overestimating can suggest that you are trying to get more funding than you need. Therefore, ensure all relevant details and justifications for the costs are included in writing.

If the grantor provides a budget template, use it. The template is usually formatted with formulas for the Federal Insurance Contributions Act (FICA), consultant rates, etc.

C. Other Commonly Required Information

Congressional District – Click [here](#) for the Congressional District Locator, which is searchable by address.

Census Tract – Click [here](#) and [here](#) for the Census Tract Locator that is searchable by Address.

City's arc GIS Census Tract Map: [Census Tract 2020 | Census Tract 2020 | Richmond GeoHub \(arcgis.com\)](#)

City of Richmond's Identification Numbers – See the list below:

- SAM Unique Entity ID (UEI): EG4LF5GYLK81
- Federal Employers Identification Number (FEIN): 546001556
- State Employers Identification Number: 001219954-6
- Federal Information Processing Standards (FIPS) Code: 760

D. Using Artificial Intelligence

Our responsibilities as grant professionals include collecting information to enhance the project/program narrative and justify the need for support. At times, we may seek the assistance of artificial intelligence (AI) to provide guidance and support in areas requiring more depth. While there is no official policy or clarity on the use of AI, it is crucial to write with integrity, cite resources, and avoid plagiarism. Generally, utilize AI to generate or prompt ideas or suggestions, but not as a substitute for your years of knowledge,

expertise, and authenticity. Some commonly used resources are [ChatGPT](#) and [Grammarly \(Free AI Assistance\)](#).

Grant Application Review

Grant review assesses grant proposals before their final submission and ensures that funding resources are allocated to projects with the most significant potential for impact and success.

It is best to have three types of reviewers for your proposal drafts: a content/field expert with extensive knowledge in your field, an intelligent "non-expert," and an excellent editor.

The Grants Team will review grant applications before submission to the CAO's office. The CAO will not sign off on grant applications that the Department of Budget & Strategic Planning has not reviewed and approved.

Email the completed [Grants Review Authorization Form](#) (**Appendix A**) and the grant application to AskGrants@rva.gov.

Grant Application Submission

Grant submission refers to formally submitting a grant proposal or application to a funding agency or organization for consideration. This process typically involves preparing the necessary documents, completing application forms, and adhering to specific submission guidelines outlined by the funding body.

A. Authority to Submit the Grant Application

The Grants Team must review and approve the grant application before it is emailed to the CAO for review and approval. Once the grant application is approved, the department can request the CAO's signature for grant submission. To request the CAO's review and signature of the grant application, the department submitting the grant must complete the CAO Grant Cover Sheet (**Appendix B**). Attach the CAO Grant Cover Sheet, the [Grants Review Authorization Form](#), and the grant application to the email. The grant application should include the necessary documents in the grant's notice of funding opportunity. In the body of the email, include a summary of the request.

The CAO's office requires seven (7) to ten (10) business days to review, approve, and sign the grant application. The office will email the approved and signed grant application to the applicant for submission and to the Grants Team. The grant submitter will email the grant application to the grantor, and the department's eCivis Point of Contact (POC) will upload it to <https://ecivis.com/>.

If the Mayor's signature is required to submit the grant application or a document within the application package, follow the procedures above but indicate the request for the Mayor's signature on the CAO Grant Cover Sheet and in the body of the email to the CAO's office and Grants Team. The CAO's Office will route it to the Mayor's office, which requires up to twelve (12) days for review and signature.

B. Saving Grant Application

Once the Grant Application is written, reviewed, and submitted, the eCivis POC will upload it to eCivis for the Fiscal Year you have applied (not the year the funding will be utilized). The purpose of storing and cataloging the grant application is to allow interdepartmental collaborations and to use previous grant applications to streamline future grant writing, especially when time is of the essence.

Grant Award Notification

After receiving a grant award, grant recipients typically take several necessary steps to effectively manage and implement the funded project. By effectively managing and implementing the funded project, grant recipients maximize the impact of the grant award and fulfill their obligations to the funding agency, stakeholders, and the community.

A. New Grant Funding & City Ordinance and Resolution (O&R) Process

For new grant funding **not included** in Special Fund Details of the adopted budget, your department must participate in the Ordinance and Resolution (O&R) Request Process to accept and appropriate **new** grant funds. Click [here](#) for the current O&R Submission Schedule. Special Fund Details are in the **Grants and Special Funds Summaries** section of the [Budget Documents](#). Departments are listed in alphabetical order. Before the department begins the O&R process, meet with your department's assigned [City Attorney](#) and Granicus Editor. For an updated list of Granicus Editors, send an email to AskGrants@rva.gov. Please include all critical information in your [Ordinance](#), including any local match funds, donations, or fees for the grant/program. Click here for the [O&R Submission Schedule](#). **NOTE: Coordinate with your Department Directors to ensure all appropriate parties are involved in the approval process per your department directives.**

B. Grant Agreement and Acceptance

Carefully review the grant agreement or contract to understand the terms and conditions. Formally accept the grant award as per the funder's instructions.

Alert the CAO's office if the grantor plans to email or mail the award acceptance letter or grant agreement to the City of Richmond. If the grantor does not send an official award acceptance letter, the city department must craft a [CAO Award Acceptance Memo](#) and request the CAO's signature to accept the award.

C. Grant Setup and Checklist

Email the Department of Finance Grants Manager at Finance@rva.gov. Follow the Department of Finance Grant Setup Checklist Memo (**Appendix C**), and email one complete packet to the Department of Finance Grants Manager and the Grants Team.

DOF Grant Setup Checklist:

- Adopted Ordinance
- Executed Memorandum of Understanding (MOU)/Program Contract/Agreement
 - Signed by the CAO or his designee
 - The City Attorney's Office has reviewed/signed
- Award Letter from the Funding Entity
- Signed Award Acceptance Letter
 - Signed by the CAO (unless provided by the first bullet)
- New Fund Request Form
- RAPIDS Budget Expense Form (EB)
- RAPIDS Budget Revenue Form (RB)
- Adopted Budget (see the detail section of the budget to ensure the grant was listed)
- If an Appropriation/Match from the General Fund is required, please provide documentation of appropriation approval and identify the accounting string for the Appropriation transfer.

D. Grant Deposits

Grant deposits will depend on the type of funding source. Most agencies will use an electronic source, and the department will need an Electronic Data Interchange (EDI) Fund –Agency Request For Reimbursement Form (**Appendix D**). Other deposits could come as a PAY-In, electronic deposit forum such as The Automated Standard Application for Payments (ASAP). Federal agencies use this electronic system to transfer money to recipient organizations securely. Federal agencies enroll recipient organizations, authorize payments, and manage their accounts. Recipient organizations then request payments from these pre-authorized accounts. Recipient organizations include state and local governments, educational and financial institutions, vendors and contractors, profit and non-profit entities, and Indian tribal organizations.

All EDIs should be filled out with the required information. Please note that all deposits require a revenue account code. Email the completed/signed form to the Revenue Manager and the Department of Finance Grants Manager.

For general questions, contact the Department of Finance at Finance@rva.gov.

E. Grant Management

The Finance Grants Manager (Department of Finance) will notify all parties of the new grant award, including the award and project numbers.

- **Project Implementation:** Start your project according to the plan outlined in your proposal.

- **Track Expenses:** Keep accurate records of all expenditures and ensure they align with the approved budget.
- **Reporting:** Submit regular progress reports to the funder as required. This may include financial reports, program updates, and an evaluation of the project's outcomes.

F. Grant Closeout and Grant Extensions/Modifications

When the department expends the grant per the award guidelines, it must submit the grant closeout form (**Appendix E**) to the Department of Finance Grant Manager and the Grants Team.

Be prepared to submit a final report to the grantor detailing the project's outcomes and how the funds were used. According to federal guidelines, the grantee should be prepared for a possible desk review or audit, where the grantor may review your financial and project records. Finally, the department must file all grant documents for at least three years following grant closeout.

If the department needs to extend the grant, written approval from the funder should be sent to the Grants Team and the Department of Finance Grants Manager, and the extension should be updated in the module. This process will require the Budget Department to establish a new baseline for the extended award.

G. Sustain the Project

- **Sustainability:** If applicable, work on securing additional funding or other resources to continue the project after the grant period ends.
- **Acknowledge the Funder:** Publicly acknowledge the grantor's support in any publications, presentations, or other communications related to the project.

H. Grant Denial

Finding out why the grant application is denied is a good idea. You can either call or write to the grantor and ask for feedback. This will help you understand how you can improve your application in the future. Keep going even if your application is rejected - securing a grant often takes more than one attempt. Use the feedback you received and apply again at the next opportunity. Ask for a list of grant recipients or check their website to see who was awarded the grant. This will give you a better idea of what they seek in an application.

APPENDICES
Appendix A.
Grants Review Authorization Form



CITY OF RICHMOND
REQUEST FOR AUTHORIZATION

To: Grants Division
 Department of Budget & Strategic Planning

From: _____

Date: _____

Request for Authorization Summary

Document Title	i.e. (Grant Application)
Requested by Date*	
Impact on the City	\$0.00, no match
Budget Analyst Review/Approval (Signature Required)	
DCAO/Director Approval (Signature Required)	
Return signed document(s) to Grant Coordinators	Terrence Banks, 804-646-3898 GiTonya Parker, 804-646-1129 AskGrants@rva.gov

* NOTE: The Grants Coordinator requires all paperwork to be submitted **7 to 10 Business Days before the Deadline to ensure adequate time for review.**

Background & Notes for the attached document (if applicable): _____

FOR BUDGET OFFICE USE ONLY

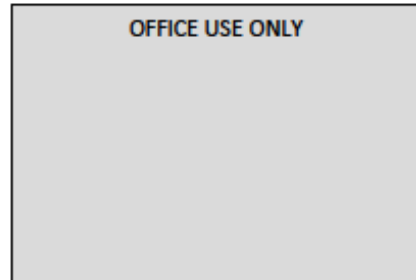
Document Rec'd Date: _____ **Document Number:** _____

**Appendix B.
CAO Grant Cover Sheet**



**CITY OF RICHMOND
GRANT COVER SHEET**

To: J.E. Lincoln Saunders
Chief Administrative Officer



From: _____

Date Submitted: _____

Requesting Agency's Assertion:

I, _____, have reviewed the attached documents for accuracy and completeness, and therefore request the signature of the Chief Administrative Officer.

Grant Summary and Request

Grant Name			
Type of Paperwork <small>(Application, Renewal, Award, Certification, etc.)</small>			
Requested by Date			
Local Match Required?	YES	NO	Percentage of City Dollars:
O&R Required?	YES	NO	
Physical Signature Required?	YES	NO	
Summary of Request			
Return signed document(s) to			

SEND SCANNED DOCUMENTS TO: CAO-OFFICE@RICHMONDGOV.COM

Please allow 7-10 business days for documents to be reviewed and signed by the Chief Administrative Officer. Contact the CAO's office if the document needs to be signed sooner.

**Appendix C.
Grant Setup Check List Memo**



CITY OF RICHMOND
DEPARTMENT OF FINANCE

Date

TO: All City of Richmond Departments

FROM: Department of Finance General Accounting
Julie A. Ashford, Grants Manager

RE: Grant Setup Checklist

To facilitate the setup of Grant Awards, the following items are needed to expedite the process:

1. Executed Memorandum of Understanding (MOU)/Program Contract/Agreement
 - a. Signed by the CAO and/or his designee
 - b. City Attorney's Office has reviewed/signed
2. Award Letter from the Funding Entity
3. Signed Award Acceptance Letter
 - a. Signed by the CAO (unless provided by the first bullet)
4. New Fund Request Form
5. RAPIDS Budget Expense Form (EB)
6. RAPIDS Budget Revenue Form (RB)
7. Adopted Ordinance
8. Adopted Budget (see the detail section of the budget to ensure the grant was listed)
9. If an Appropriation/Match from the General Fund is required, please provide documentation of appropriation approval and identify the accounting string for the Appropriation transfer.

Please acknowledge that you have submitted all the above items to complete the setup.

Signature: _____

Printed Name: _____

Telephone Number: _____ Date: _____

If there are any exceptions, please note.

Thank you.

**Appendix D.
EDI Agency Request for Reimbursement Form**



**Electronic Data Interchange Fund
EDI –AGENCY REQUEST FOR REIMBURSEMENT FORM**
(INTENDED FOR TRACKING PURPOSES ONLY)
FINANCE DEPART. 10th FL CITY HALL RM 1004

DATE OF REQUEST: _____ CODE/OTHER: _____

AGENCY: _____ ORIGINAL AWARD AMT: \$ _____

FUNDING PERIOD: _____ FY: _____

REIMBURSEMENT REQUESTED FROM:

STATE: _____ FEDERAL: _____ CFDA#: _____ OTHER: _____

FULL REVENUE ACCOUNT STRING _____ AWARD#: _____

PROJECT#: _____

CURRENT AMOUNT REQUESTED: \$ _____

REMAINING BALANCE OF GRANT: \$ _____

SIGNATURE OF REQUESTOR: _____ DATE: _____

CONTACT EMAIL/PHONE #: _____

*(REQUIRED)

Appendix E. Grant Closeout Form



Closeout Checklist for Special Funds/Grants

All of the information requested below must be provided before the Special Fund or grant account can be closed. Please submit the completed form and attachments to the Department of Finance.

Grant/Special Fund Activity Information

Department/Agency		
Name of person completing the form		Phone
Grant name or Special Fund activity		
Full RAPIDS Accounting String		
Grantor grant/contract/identification number		Fund/Cost Center
Award amount	Cash match amount	CFDA number if Federal
Name of Originating funding source		
Name of Pass-Through funder (if applicable)		
Grant start date	Grant period end date	Budget period end date
Funding type	Grant type if applicable	New or Other

Accounting/Reconciliation

Confirm all expenditures & revenues been posted to this RAPIDS account string?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Have all outstanding encumbrances been cleared?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Verify that valid expenditures & revenues are posted to this RAPIDS account string?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
If a grant, verify that all revenue has been received from the grantor?	N/A <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
If a grant, are the RAPIDS Award balances zero?	N/A <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Are cash balances zero?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Are accounts receivable and payable balances zero?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Are encumbrances balances zero?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Did the RAPIDS Account generate program income from fees?	YES <input type="checkbox"/>	NO <input type="checkbox"/>

Reimbursement to Grantor

Does the RAPIDS Account have to reimburse cash to the Grantor?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	Amount
Has a not-encumbered invoice been prepared for reimbursement of these funds?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	

Disposition of Federal Property (OMB Circular A-102, Subpart § .33)

Is there federal property to be disposed of?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Was a list submitted to the awarding agency for review?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Did you receive a confirmation from the Federal funder regarding the federal property?	YES <input type="checkbox"/>	NO <input type="checkbox"/>

Reporting

If the grantor is federal, were any of the following submitted to the funding agency?		
SF-425 <input type="checkbox"/>	SF-425a <input type="checkbox"/>	SF-270 (Request for Advance or Reimbursement) <input type="checkbox"/>

Required Documentation

Please attach the following: Copy of Final Report <input type="checkbox"/>	Copy of grantor closeout letter/notification <input type="checkbox"/>	N/A <input type="checkbox"/>
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Agency Certification

I certify that the above information is correct	Printed Name	Signature	Date
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Department of Finance Authorization

Is reconciliation complete?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Was a request to deactivate the Award Number sent to General Accounting?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Is the Award Number deactivated?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Is the account authorized for closure by the Department of Finance?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Name (print)	Authorizing Signature	Date

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