Grant Managers
Brown Bag

TECHNOLOGY AS YOUR GRANT MANAGEMENT FRIEND

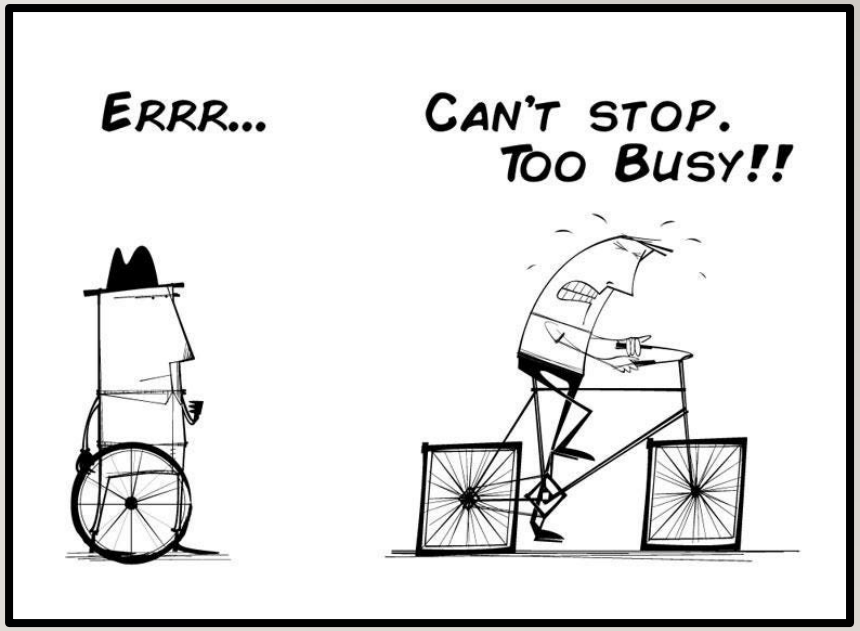
APRIL 2023

WHY TECHNOLOGY

- GSP has implemented new strategies to support grants
- District is utilizing new processes to improve accountability and audit readiness
- FCMAT recommendation

FCMAT RECOMMENDATION

- Identify standard workflow across and within District/colleges and develop processes to facilitate workflow from New Award Set Up to Grant Closeout
- Develop processes for monitoring grant expenditures on a regular basis
- Establish process for grant compliance
- Develop and implement subaward processes & procedures
- Develop and deliver new grant manager training
- ***Utilize technology to support grant coordination, development, and management***



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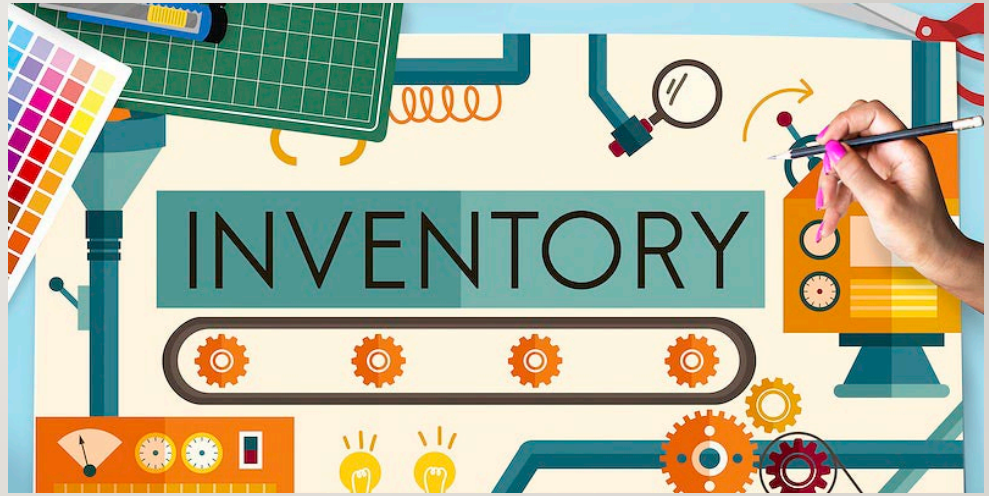
FOUR AREAS WHERE TECHNOLOGY MAY ASSIST

1) Equipment Tracking
2) Grant Monitoring
3) New Grant Manager Orientation & Training
4) Contract Processing and Tracking

EQUIPMENT TRACKING

- Capital Asset Inventory Management
  - RCCD utilizes Sage Fixed Asset Software
  - Allows the district to manage capital assets from acquisition to disposal
  - Addresses federal asset tagging and equipment tracking requirements
  - Managed by Chris Horeczko



WHAT IS THE BENEFIT TO GRANT MANAGEMENT

- Sage will track the following information
  - Inventory purchased with grant funds
  - Location of said inventory
  - Age of equipment
  - Depreciation value
- Ability to generate a report of all equipment purchased with grant funds
- Allows for the scanning of asset barcodes with any Android mobile device or use a barcode scanner
- Checks in and checks out assets
- Provides an audit trail

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HOW CAN GRANT MANAGERS USE SAGE

To utilize Sage Software for Grant Management and Compliance

1) Grant Managers must add the following information to the grant requisition:
   - ✓ Indicate inventory is purchased with grant funds
   - ✓ Identify funding source; note if federal
   - ✓ For federal grants, include award number and any language required by the funding agency
2) This information will be used to develop asset tags and track inventory in Sage

Sage Fixed Assets - Premier Tracking

File Edit View Asset Inventory Reports Customize Window Help

Assets

Tasks

- Add an Asset
- Check-In Asset(s)
- Check-Out Asset(s)
- View Check-Out History
- Replicate an Asset

Customize

- Save as a Template
- Customize a Field
- Create a SmartList
- Change User Preferences

- Assets
- Reports
- Inventory
- System Administration
- Assistance Center

Asset Detail - RCCD (Test-Dev) (Read Only)

Version 2022.1

Asset 070277: Computer, Tablet, Surface Pro 4

Status: Active

Asset ID: 070277 Go < > Group: <All Assets>

Main | Notes | Images | History

System Number: 78

General Information

> Items in bold are required fields

Asset ID	070277	Serial Number	039586464853
Make	Microsoft	Model	1724
Description	Computer, Tablet, Surface Pro 4	Quantity	1
Acquisition Date	09/28/2017	Tagged By:	Inventory Control
Location (Campus)	Centennial Plaza	Floor	
Building		Room	
Owner (User)	Paula Barrera	Fiscal Year	2018
Purchase Order	P0060962	P.O. Date	08/28/2017
P.O. Amount, Total	11117.45	Vendor	29672 - CDW-G
Ship To Location	DGCS - GRANTS CAADO	Fund	12
School (Dept.)	AJK	Resource code	1190
Goal code	6010	Function code	4172
Object code	6485	Class	CE
Condition	Excellent	Expiration Date	MM/DD/YYYY
Is Federal Grant?		% Fed. Participate	0.00
Grant Fund Agency		Grant Award #	
Unit Cost	0.00	G/L Asset Account	
Exception Status		Reconciliation Status	
Check-out Date	MM/DD/YYYY	Expected Return Date	MM/DD/YYYY
Property Type	P	Activity Code	A
Disposal Date	MM/DD/YYYY	Disposal Method	

Asset List | Print Detail | Save Asset | Help

RCCD\ccervantes | GNP Org. | 4/20/2023

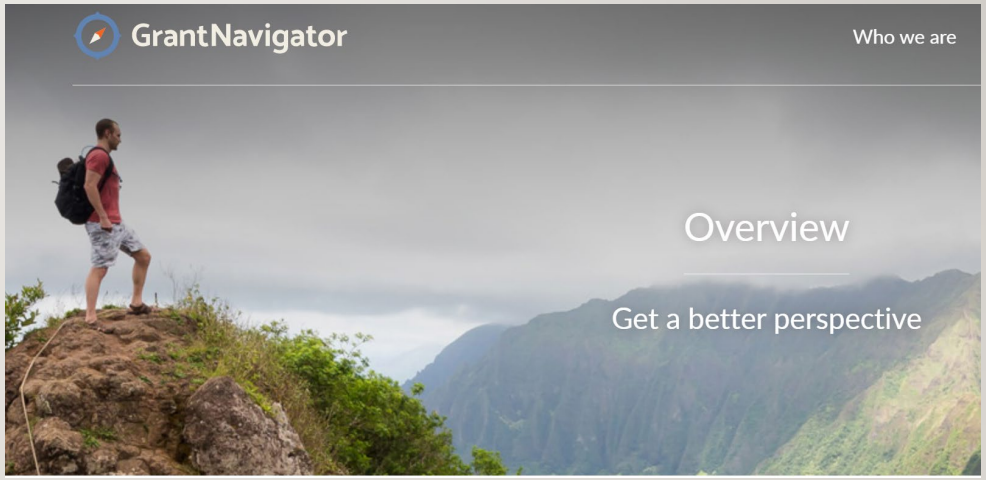
EQUIPMENT INVENTORY

1) At this time, grant managers cannot access the Sage database directly
2) To access data and/or pull reports, grant managers should contact Cristina Cervantes in the Grants Office or Chris Horeczko in Capital Assets

GRANT MONITORING

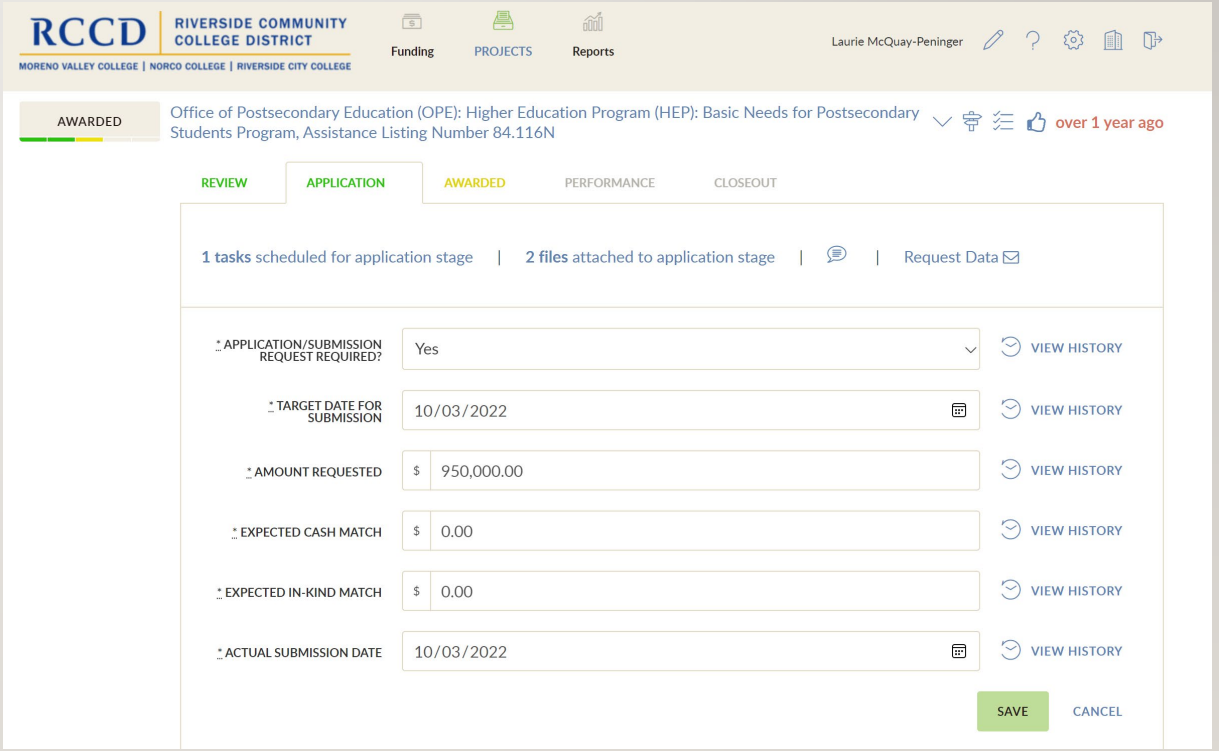
Grant Navigator

- A web-based grant management and compliance solution built around the grant life cycle
- The system offers:
  - Intuitive dashboards & alerts offering real-time visibility
  - Configurable reports targeting the needs of every stakeholder
  - Centralized document libraries, data repositories & deadline calendars



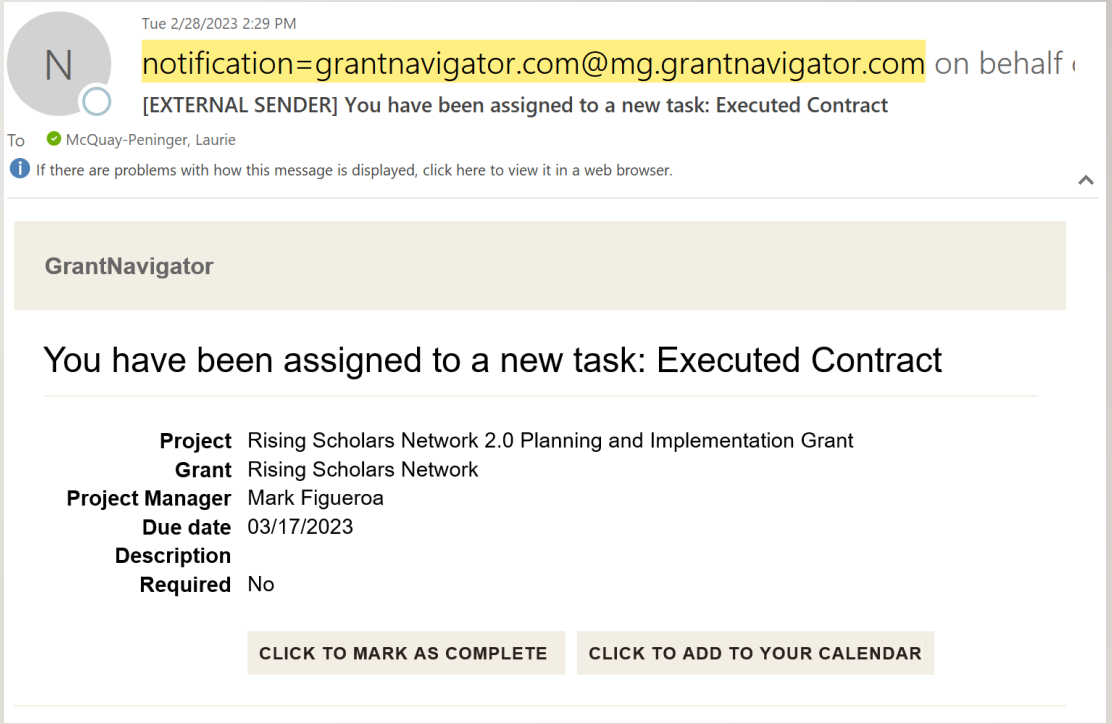
WHAT ARE THE BENEFITS TO GRANT MANAGERS

1) Document Storage
2) Key Information
    1) SPP
    2) Start and End Dates
    3) Reporting Deadlines
    4) Reminder Emails
3) Report Generation



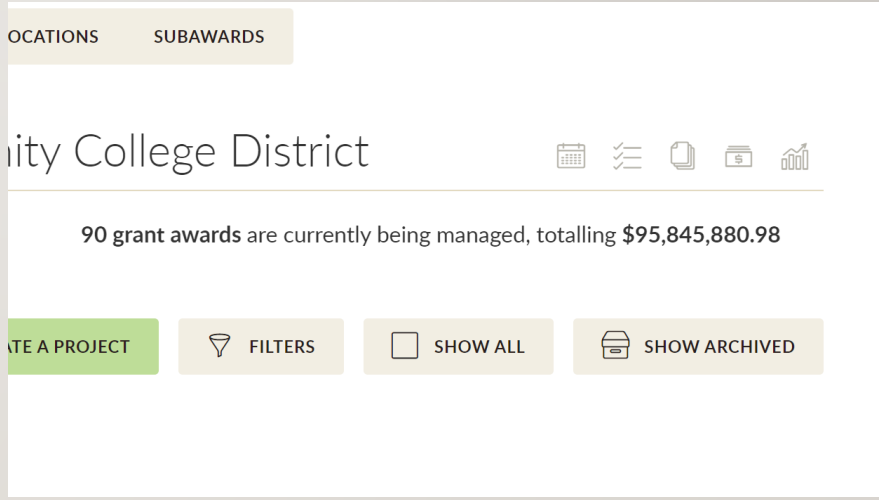
HOW CAN GRANT MANAGERS AND OTHERS USE GRANT NAVIGATOR?

1) Can request view access to have direct access to stored documents and need to know information
2) Reply to requests for information from Grants Team, including:
    1) Document upload
    2) Reporting reminders
3) Request customized reports for specific information



GRANT MONITORING – NEXT STEPS

- Grants & Sponsored Programs continues to work to populate Grant Navigator
- Access has been limited, but available upon request
- Challenges include:
  - Uploading information for grants that are currently active
  - Inactive grants
  - Naming convention



GRANT TRAINING

- FCMAT Recommendation
  - To develop and deliver New Grant Manager Orientation
  - Ongoing grant management training for anyone engaged in grant management

GRANT TRAINING

Currently Available

- Grant Brown Bags
- Grant Management Handbook
- One on One Grant Accounting Technical Assistance
- Grant Website

  Grants & Sponsored Programs (rccd.edu)

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GRANT TRAINING

Under Development

1) Use Canvas to deliver training to new grant managers
   - Getting Started
   - Financial monitoring/Galaxy Basics
   - Purchasing
   - Concur
2) Break training into modules that can be accessed on your own time and reviewed as needed
3) To the extent possible, use discussion rooms and threads to offer real-time assistance and one on one and small group support

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CONTRACT PROCESSING & TRACKING

1) FCMAT Recommendation

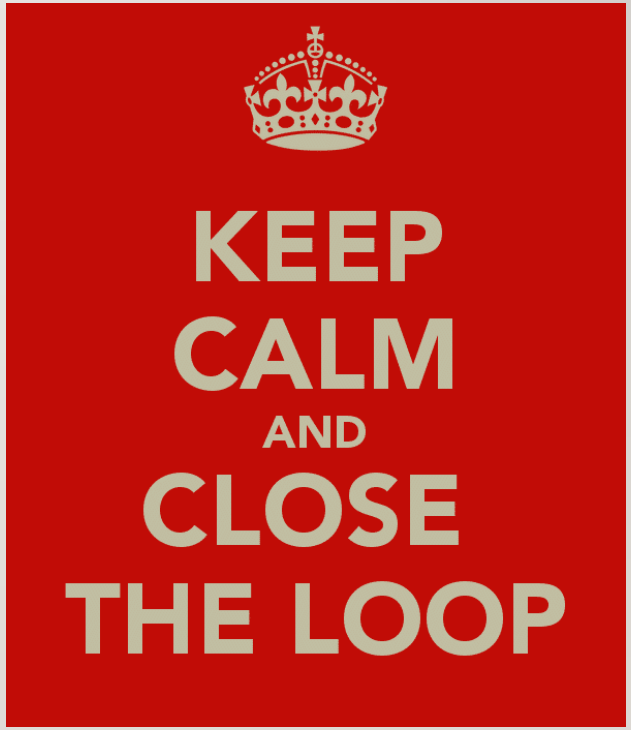
- To develop and implement Subaward Process & Procedures

2) Grant Office Goal & Outcome

- Reduce the amount of time it takes to complete the contract process

3) Concerns from End Users

- Inability to close the loop



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CONTRACT PROCESSING & TRACKING

Current Process

- Depends on type of contract
- ACT Process
  - Multiple reviews and approvals
  - Legal review may be required
  - Board approval may be required
  - May go to Purchasing before returning to initiator
  - No easy means of identifying where contract is in the process

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CONTRACT PROCESSING & TRACKING

Under Development

1) Identify a technological solution to process contracts that allows the initiator to identify where in the process the contract is
2) Work with Business Services to implement this process as part of Post Award Grant improvements

WHAT ELSE IS HAPPENING

- Post Award Grant Management Survey
  - Sent to all individuals who:
    - Manage grants
    - Supervise grant managers
    - Support grant management
    - Manage grant funds
  - The goal is to improve user satisfaction with the post award process, targeting
    - Efficiency
    - Effectiveness
    - Timeliness
    - Clarity
    - Consistency

QUESTIONS AND PONDERINGS

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Where else can we use technology to make improvements?

What else should be included in the New Grant Manager Orientation?