

**JUAN PABLO GONZALEZ –
INTERIM ASSISTANT CITY
AUDITOR**

Grant Creation Form (City Side)

What is the Grant Creation Form?

- ▶ This form was developed to make it easier on the Auditing Department to track and create grants for departments on the city side.
- ▶ The School Department piloted a slightly different version for a couple of months, and they have their own form to request their grants to be created.
- ▶ The information requested on this form is needed to build grant accounts from the ground up.
- ▶ This helps the Auditing Department with internal controls when it comes to the tracking of state and federal grants for reporting purposes.

How to fill out the Grant Creation Form (Department Information Section)

- ▶ **Request Date:** Date in which you are requesting the grant to be created.
- ▶ **Requesting Department:** Department that was awarded the grant.
- ▶ **Requester's Full Name:** Full name of the person or department head requesting the grant to be created.
- ▶ **Fiscal Year:** Year in which the grant was awarded.

How to fill out the Grant Creation Form (Grant Details Section)

- ▶ **Grant Name:** Full name of the grant
- ▶ **Amount Awarded:** How much is the grant for?
- ▶ **Start and End Date:** Dates in which the grant started and when it ends. Please use accurate dates.
- ▶ **Grantor ID:** ID that was given to the grant. Example for the SORPEC Grant: INTF123456789
- ▶ **Grantor Type:** Is it a Federal or State grant? If it is Federal, see the next step.
- ▶ **Federal CFDA:** If the grant is a Federal grant, you must provide us with the CFDA. If this is left blank, we will reject the request until we receive this code.

How to fill out the Grant Creation Form (Grantor Details Section)

- ▶ **Awarding Department:** Example: The grant is from the Department of Public Health.
- ▶ **Contact Name:** Name of the person who is the point of contact for that grant.
- ▶ **Phone:** Phone number to reach the point of contact listed above.
- ▶ **Email:** Email to the point of contact listed above.

How to fill out the Grant Creation Form (General Description – Very Important)

- ▶ This section will determine what object codes to use when it comes to the expenditure classifications on Munis.
- ▶ You must be very detailed in this section regarding what the grant will be used for. Do not put something like “we are paying an employee or vendor.” That is not sufficient and will get the request rejected.
- ▶ An example of what we are looking for is: With the SORPEC grant, we planning to pay employees full time salaries, buy equipment like computers, and pay for other contract services.
- ▶ This example will tell us exactly what expenditure codes to use to make it easier on you and on us to know where the money is being spent.

Questions?

- ▶ This is not going to be easy at first. The department is aware of how a significant change can confuse people or make them reluctant to change. But this process must happen.
- ▶ If you have any questions, please contact the Interim Assistant City Auditor – Juan Pablo Gonzalez at jgonzalez@cobma.us or 508-897-6456.
- ▶ Please be patient. We will work with you every step of the way.