

Grant Management 101: Be the Leslie Knope of Whatever Grant You Manage

2019 Grant Management Workshop | November 19-20, 2019

OUTCOME

An increased understanding of the grant manager's role and responsibilities.

WHO IS LESLIE KNOPE?

Leslie Knope is the Deputy Director of Parks and Recreation for the Town of Pawnee, IN. She is an organized and passionate public servant and a champion for projects that improve the quality of life for residents in her community.

FRIENDS. WAFFLES. WORK.

Grant Managers are responsible for a grant's:

- Friends | People
- Waffles | Processes
- Work | Paperwork

FRIENDS | PEOPLE

Grant Managers are responsible for bringing **all** of the appropriate people together to ensure a project's success. This requires knowing who needs to be at the table and what their responsibilities will be, facilitating project-related communication, and creating a collaborative space.

WHO NEEDS TO BE INVITED TO THE TABLE?		
Project Management Team?	Housing Rehab or Façade Board?	Other Project "Friends"?
Sparkplug/Project Area Rep	Sparkplug/Project Area Rep	Administrative Assistants
Elected Official	Elected Official	
Chief Administrative Officer	Chief Administrative Officer	
Financial Manager	Housing Authority Director or Downtown Association Director	
Project/Program Manager	Property Owner	
Architect and/or Engineer	Rehab Specialist	
Attorney	Building Official	
Others:	Others:	

WHAT ARE THEIR RESPONSIBILITIES?	
Role	Responsibilities
Grant Manager	
Sparkplug/Project Area Rep	
Elected Official	
Chief Administrative Officer	
Financial Manager	
Project/Program Manager	
Architect and/or Engineer	
Attorney	
Housing Authority or Downtown Association Director	
Property Owner	
Rehab Specialist	
Building Official	
Others:	

When bringing folks together to work on a project, be mindful of their:

- Schedules
- Other Responsibilities
- Relationships
- Personalities
- Expectations

IMPORTANT REMINDERS



“Connection before direction.” –Dr. Jody Carrington



The Project Management Plan and Housing Rehab/Façade Program Design should list the roles and responsibilities of each team member. Each person should sign and date the plan.

WAFFLES | PROCESSES

Establishing written processes will:

- Outline how a task will get done, when it will get done, and who will be doing it.
- Be a resource for new PMT, Housing Rehab Board, or Façade Board members.
- Help identify delays in completing a task.
- Help bridge the knowledge gap for anyone who hasn't participated on a project.

How will the project...?

- Facilitate & Document Communication
- Address Complaints
- Manage Finances
- Procure Services (Professional, Non-professional, Construction)
- Ensure Federal Labor Standards Compliance
- Collect, Review, and Approve Applications
- Track Benefits

IMPORTANT REMINDERS



The Project Management Plan, Housing Rehab program design, and Façade program design should describe all processes and be regularly updated.



Even if it's not your responsibility to do a certain task, it is your responsibility to make sure the task gets done.

WORK | PAPERWORK

Grant Managers must maintain **all** paperwork on behalf of the grantee.

The Project Management Plan and Housing Rehab or Façade program design should describe all the roles, responsibilities, and processes for the project.

Some general paperwork reminders:

- Some documents require **original signatures** (e.g. PMP, FLS documents, contracts).
- Make sure **all** documents have a **date**.
- **Property addresses** should be included on **all** Housing Rehabilitation, Façade, and IPR project documents, including meeting agendas and minutes, legal and financial documents.
- **Agendas and minutes** should be kept for **all** meetings.

Appendix 23 provides a model filing system for general grant files and project-specific files.

Housing Rehabilitation projects should also follow Appendix 24 for the individual household files.

GRANT FILES		
Pre-Contract	Post-Contract	Project-Specific
Environmental Review Record	Project Management (Minutes & Reports)	Housing Rehab (Housing Rehab Program Design, By-Laws, Agendas, Meeting Minutes)
Financial Management	Financial Management	Downtown Revitalization (Façade Program Design, By-Laws, Agendas, Meeting Minutes)
Equal Opportunity/Fair Housing	Equal Opportunity/Fair Housing	Acquisition
Citizen Participation	Citizen Participation/Complaints	Relocation
Income Surveys	Benefits	Staffing and/or Operations Plan
User Agreements or Declination Statements	Files & Contracts	Force Account
Program Designs & By-laws	Labor Compliance	Microloan
Procurement	Procurement	Telecommunications

IMPORTANT REMINDERS



Set up the filing system early (Appendices 23 and 24).



Retain paperwork with original signatures, dates, and addresses as appropriate.



The grantee should not sign any agreements until a contract with DHCD has been executed.



IF IT'S NOT IN WRITING, IT DIDN'T HAPPEN.

FINAL WORD

Grant Managers are responsible for:

- Coordinating **all** people associated with the project
- Providing oversight for **all** project processes.
- Maintaining **all** grant paperwork.