



AmeriCorps Washington

Planning Grants – Reporting/Retention/Close-out

June 23 – 10am

Please sign-in via the chat box:

- Organization/Program
- Name(s)
- What is your most interesting “ice-breaker” question?

Learning To Date

Previous Content

- AC 101/Locating/Reviewing/Reading AmeriCorps Guidance
- Theory of Change/Logic Models/Performance Measures/Data
- Member/Site Development Series
- Policies/Procedures
- Volunteer Planning
- AmeriCorps Initiatives/Events/Brand

Today's Agenda

- **Reporting for Operational Grants**
- **Records Retention**
- **Close-out**

That's all folks!



Questions to Consider

- What “gear” will be provided to AmeriCorps members.
- How will the program educate the community and potential service recipients on availability of services?
- How will the program educate local leaders, state/congressional delegates, and other VIPs on the value of AmeriCorps?
- **Where will records be stored? Who will manage records retention?**
- **How does this new knowledge change the budget/match in order to run a successful program?**



Reporting Requirements (Ops)

- Outlined in the [Serve Washington Special Terms and Conditions](#) (operational)
- Also in [Handbook](#), Chapter 5
- Includes both fiscal and programmatic
- May change annually
- Reporting requirements are trained to during new program orientation AND discussed at the annual subgrantee meeting (July) before the next program year



Reporting Requirements (Ops)

Monthly	Periodically	Semi-Annual
A-19	45-Day Status Report	Federal Financial Report (FFR)
Periodic Expense Report (PER)	90-Day Status Report	Other Federal Funds Report
Program Income Report	Service Project/Event Reports	Unexpended Funds Report
Member Roster (eGrants)		Semi-Annual Progress Report



Records Retention (Plan&Ops)

- Outlined in the [Serve Washington Special Terms and Conditions](#)
- Subgrantees are required to retain and maintain copies of all documentation associated with the grant in accordance to Washington State Law RCW 40.14.060, which requires official public records or office files and memoranda to be retained for a period of **six years** following the formal closeout of the **prime** Serve Washington grant. Because state law is more restrictive than the federal law, subgrantees of Serve Washington must retain records for the longer period of time.
- Serve Washington will provide a formal notice to each affected subgrantee when the closeout of a **prime** grant occurs. This notice will include which subgrant agreements are included and when to begin the retention period.



Planning Grant Close-Out

Planning Grants end July 31.

Grantee Responsibility

- Submit final invoice on/around August 15.
- Also include on/around August 15:
 - Submit final FFR (located in fiscal workbook).
 - Submit final OFF (located in fiscal workbook).
 - Submit close-out form (Robyn will post and send).

Serve WA Responsibility

- Final Feedback Memo
 - Sent to program contact, fiscal contact, and auth rep



Questions?



“Homework”

- *Continue reviewing and reading AmeriCorps guidance documents.*
- *Continue any unfinished objectives from the planning grant period.*
- **Finalize budget framework.**
- **Develop a system for records retention.**
- **Submit all close-out requirements.**
- ***If awarded an Operational Grant, attend Serve WA Annual Subgrantee Meeting.**
 - **Also, based on the Auth Rep form submitted, you and your organization will begin to be add to distribution lists as noted on the form.**



Deliverables

- Final requests for feedback?
- Close-out form

Submit to **Robyn** anytime (through end of July) for general feedback.

Robyn Harris – robyn.harris@ofm.wa.gov



Closing

“NEVER DOUBT THAT
A SMALL GROUP OF
THOUGHTFUL, COMMITTED
PEOPLE CAN CHANGE
THE WORLD. INDEED,
IT IS THE ONLY THING
THAT EVER HAS.”

MARGARET MEAD

