



Serve Washington

Changing Communities. Changing Lives.

Planning Grants – Reporting and Retention

May 20 – 10:00AM

Please sign-in via the chat box:

- Organization/Program
- Name(s)
- What is one change you like as a result of the pandemic?

Announcement(s)!

Let's revisit/clarify:

AmeriCorps Gear – formal events/service projects/media should be in well-branded apparel, day to day should have access to identification such as button or name tag

Media Release – name Serve Washington and AmeriCorps in addition to legal applicant organization and host site



Learning To Date

Previous Content

- Quarter 1 Content
- Quarter 2 Content
- Quarter 3 Content

Today's Agenda

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

Next Up (*June 17*)

- Grant Close-Out Process
- Open Q&A – Last Webinar!



Quarterly Questions

- *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

- Outlined in the [Serve Washington Special Terms and Conditions](#)
- 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

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

- 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.



“Homework”

- *Continue any unfinished objectives from Quarter 1, 2 and 3.*
- *Continue any unfinished objectives; such as, National Days of Service, Serve WA Events and Initiatives, and Marketing and Branding Strategies.*
- **Finalize budget framework.**
- ***If applied to RFGA, respond to any application requests.**
- ***Did your organization receive an operational grant for PY21-22? Begin to follow steps on notification letter!**



Deliverables

- Final Requests?

Submit to Program Officer anytime through **June 30** for general feedback.

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Highly Suggested Deliverable

- NSCHC Policy/Procedure
- Set Up and Test Truescreen Account
- Set Up and Test Fieldprint Account
- Run Staff Checks (even if duplicative to test the system)
 - NSOPW, State of WA, FBI

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***Once you have a Truescreen account, please give the TS Division number and Organization EIN to your PO.**



Closing

Questions?

