Grants Management Division

Housing Grantee Workshop
Agenda

I. Introduction
II. Grantee Expectations
III. Navigating WebGrants
IV. Financial Workbook
V. Quarterly Performance Reports & Performance Workbooks
VI. Monitoring
Grantee Expectations

In the beginning of the Grant Term:

- Certificate of Insurance
- Background Checks
- Submission of the Financial Workbook
- Submission of the Language Access Plan (Federal Requirement)
Grantee Expectations

During the Grant Term:

- Monitoring (up to 2x a year)
- Submission of Monthly Reimbursement Requests
- Submission of Quarterly Reports including demographic data
- Submission of Budget Revision Requests
- Notification to Grants Analyst of any staffing changes
Grantee Expectations

After the Grant Term:

- Submission of a Financial Dashboard
  - $25,000 - $319,999
  - Within 6 months from end of agency’s FY

- Website Posting of Financial Audit
  - >$320,000
  - 150 days after end of agency’s FY

- Preservation of Records
# Grants Team Members

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
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<tbody>
<tr>
<td>Shirlee Victorio</td>
<td>Acting Grants Manager</td>
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<td>April Ensign</td>
<td>Acting Development Officer</td>
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<tr>
<td>Rene Ayala</td>
<td>Grants Analyst</td>
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<td>Warda Ali</td>
<td>Grants Analyst</td>
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<td>Lynn Hua</td>
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<td>Stacy To</td>
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<td>Manuel Avalos</td>
<td>Grants Analyst</td>
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<td>Therese Tran</td>
<td>Grants Consultant</td>
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<td>Lisa Arellano</td>
<td>Staff Specialist</td>
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