Introduction to State Grant Management

An overview of grant monitoring resources and next steps for Grantees following the execution of a new Standard Agreement.
Welcome!

Congratulations on receiving an award from one of HCD’s State Grant programs! We look forward to partnering with you to ensure the success of your project.
What’s Next?

• Once you’ve received your executed Standard Agreement, you will receive a Welcome Email from the Grant Management Representative assigned to your contract within five (5) business days. Your Grant Management Representative (“Rep”) will be your point person for all program and contract-related questions moving forward.

• Included with the Welcome Email will be a “Project Contact Form” for you to fill out with the applicable contact information from your agency. Please return this to your Rep at your earliest convenience.

• Be sure to include the regular staff contact for day-to-day correspondence, as well contact information for your agency’s executive director and chief financial officer.
Hello,

Congratulations on your Homekey award.

My name is Jane Doe and I will be your main point of contact here in the State Grant Management section. Please contact me for any Homekey related questions, including all funding requests and reporting obligations as outlined in your Standard Agreement.

A few things that you may find helpful:
- Your Standard Agreement is in effect until December 31, 2026.
- An Annual Report is due January 31 for a total of 5 years. Reporting forms can be found on the program webpage at https://homekey.hcd.ca.gov/. Please be sure to use the link every reporting period to ensure you are using the most current version of the report.
- For disbursement requests please complete the Request for Funds (RFF) form located at https://homekey.hcd.ca.gov/. Once completed, the RFF can be emailed to me for processing.
- Grant funds must be expended by October 2026.

Lastly, please complete the attached Project Contact Form detailing all relevant contact information for your organization. This information will be added to our database and is only available to HCD staff. Please email me the completed form in Excel format within two weeks of the date of this letter.

Please do not hesitate to reach out to me regarding any of the items mentioned above or for any other questions or technical assistance you may need. I look forward to working with you.
Sent to the Grantee with a welcome email and every year with the Annual Report reminder

Provides the Department with up-to-date contact list of staff and executive contacts from the Grantee’s agency
The Standard Agreement contains all requirements and expectations for your project in order to remain eligible for the award. When reviewing requests for funds or submitted reports, your Grant Management Representative will use the Standard Agreement as a primary reference document to confirm compliance.

Key Points:

- Amounts for each eligible activity
- Limits on administrative funds
- Reporting due dates
- Expenditure deadlines
- Contract expiration date
- Special Conditions and milestones
Requesting Funds

Request for funds (RFF) forms can be found on the corresponding program’s website. RFFs are to be filled out when you are requesting a disbursement from your awarded funds.

**Key Points:**

- RFFs must be completely filled out and signed by the agency’s authorized person, per the authorizing resolution.
- Amounts requested must align with award amounts in the Standard Agreement.
- The Department will review your Standard Agreement upon each RFF submission and approve amounts requested accordingly.
- Refer to your program’s guidelines or Standard Agreement to determine when an RFF can be submitted and how much of your award can be drawn at once.

*Each program will have a unique RFF form based on eligible activities and disbursement guidelines.*
Budget Revision Request

Some programs allow for funds to be moved between activities after the Standard Agreement is executed. In these cases, the grantee must obtain Department Approval by submitting a Budget Revision Form to their Rep.

Key Points:

- Budget Revision forms can be found on the applicable program website
- Not all programs allow for Budget Change requests, and those that do may limit the percentage of funds that can be moved.
- If applicable, Grantees should submit their Budget Revision forms before submitting their next RFF.
- Grantees will need to provide a justification for why funds are being moved.

*Review your program guidelines to see if Budget Changes are permissible. The Budget Change form will differ between programs.
Reporting on expenditures and project outcomes is a required component of all State Grant programs. Reports are due either annually, biannually or quarterly, depending on the program, for the duration established in the contract, and require the grantee to provide information on what was achieved during the reporting period.

The reports can be lengthy and may require supplemental documentation for verification. Give yourself plenty of time to complete this form by the specified deadline and work with your Rep if you have any questions.

**Best Practice:** Review the most current Annual Reporting form on the program’s website as soon as you receive an award in order to keep track of requested information throughout the reporting period.

*Each program will have a unique Report workbook based on reporting requirements in the program guidelines and NOFA.*
Program Websites and Contacts

- Most required forms, FAQs and other program information can be found at the corresponding program website.

- A program report or form may be updated periodically (no later than one month in advance for Expenditure Report forms). If you are unsure, confirm with your State Grant Management Representative that the form on the website is the most current version.

- If a document or question is not answered by the website, contact your Grant Management Representative or send a message to the SGM Contact Email in the upper-left corner of the page.
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<thead>
<tr>
<th>SGM Program</th>
<th>Program Acronym</th>
<th>Web Link</th>
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