Where We Are: 424 Grants!

Cohort 1

118 Total Awardees
PAs 1-7
$47,351,275

Currently in
Year 2, Quarter 3

ARPA Funds – Capacity Building

20 Total Awardees
PA 8
$7,650,000

Currently in
Year 2, Quarter 1

Cohort 2

123 Total Awardees
PAs 9-21
$103,144,425

Currently in
Year 1, Quarter 3

Cohort 3

163 Total Awardees
PAs 22-46
$149,457,413

Currently in
Year 1, Quarter 1
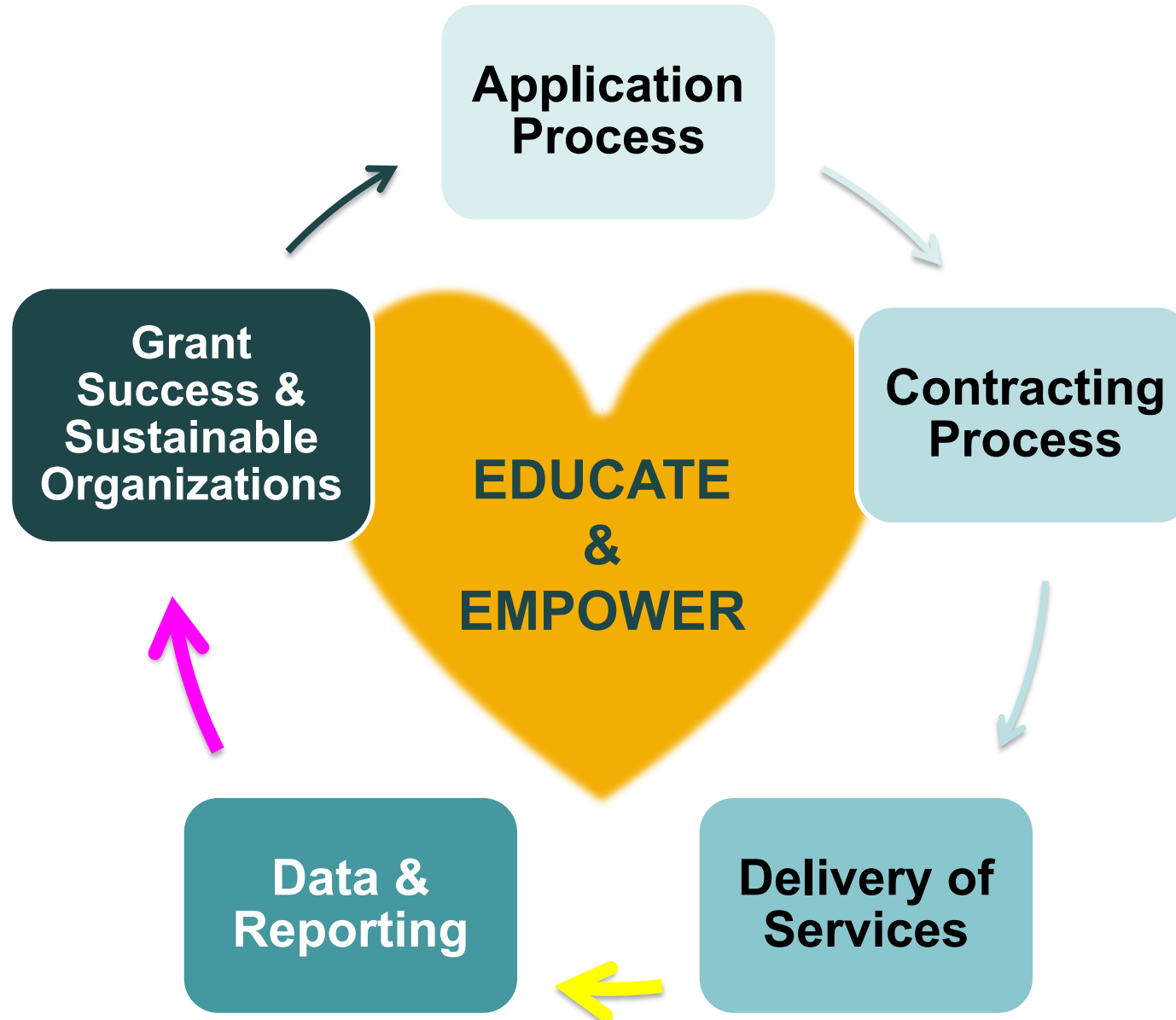
A Trauma-Informed Approach

Continuous **support to Grantees** throughout the grantee lifecycle.

Collaboration across departments (Operations, Finance, Data).

**Capacity building**, risk management, and financial oversight.

Educate & Empower

The Grantee Lifecycle

Application Process

Contracting Process

Delivery of Services

Data & Reporting

Grant Success & Sustainable Organizations

EDUCATE & EMPOWER

How Grants Are Monitored Part 1

Amity Grant Advocates monitor caseloads:

- Minimum two check-ins per month per organization
- Two site visits per organization each year
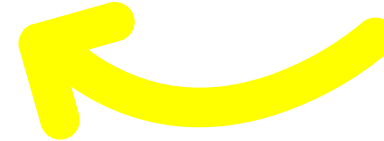
Amity Training & Technical Assistance Coordinator provides support:

- Open office hours two days a week
- Wednesday webinars & Thursday lunch-and-learns on Zoom

Amity Finance Team monitors budgets quarterly:

- Tracks all grantee budget-to-actuals expenditure reports
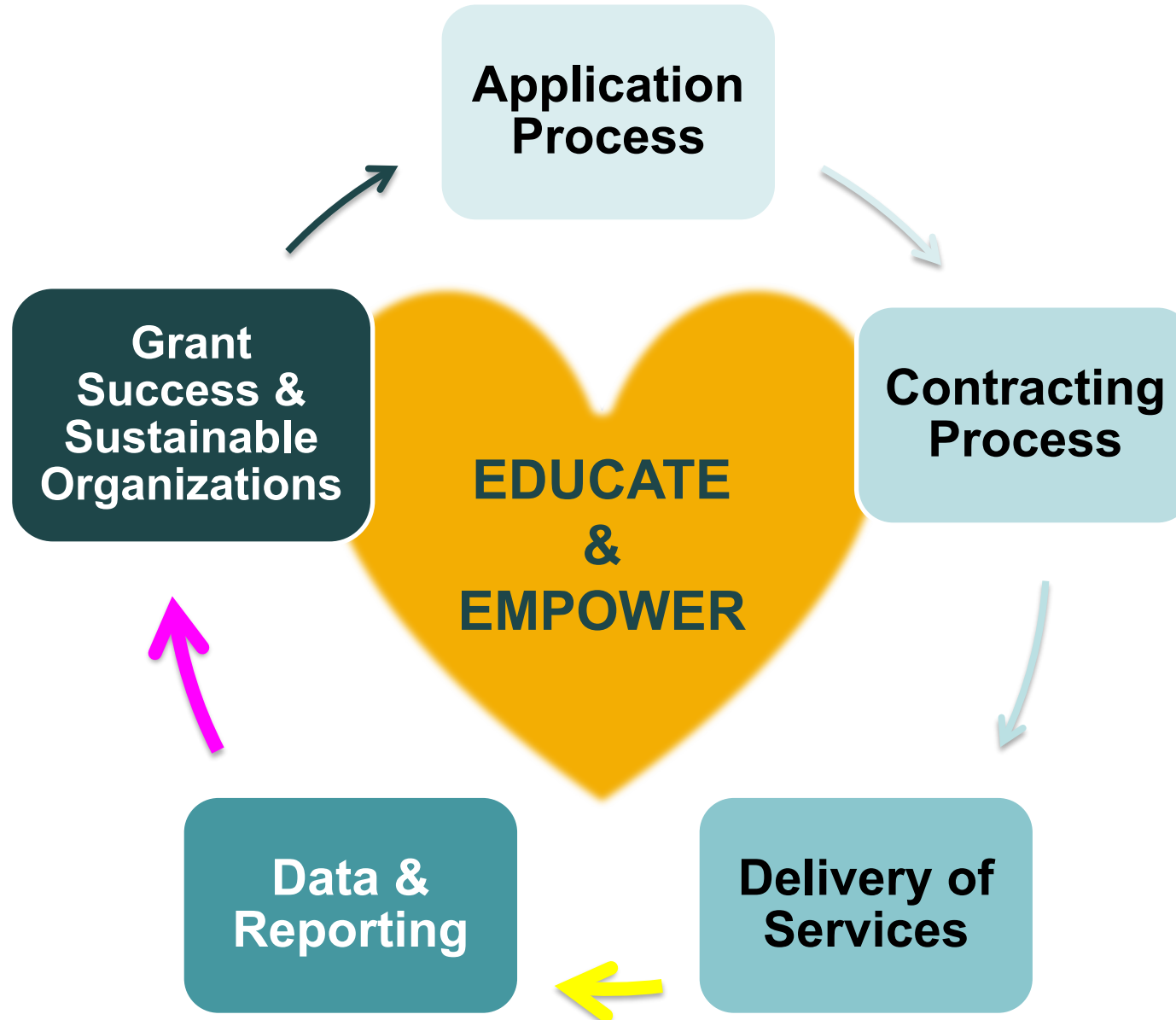- Meets with each organization at least once per quarter

Amity Data Team monitors data collection:

- Manages grantee profiles in our software
- Ongoing training and support with entering data, including program services & outcomes; drop-in lunch time meeting (Mondays)

Technical Assistance by the Numbers

Type of Assistance	Total Number of Touches Since May 2024	Number Unique Organizations Served (363 possible)	Most Common Struggles / Issues Requiring Help
INSURANCE	450 (email, phone call, video meeting)	175	• 27 rec'd pre-payment of insurance premiums by Amity • Understanding required coverage, part. Worker's Comp • Broker recommendations / how to get coverage • COI Expiration / calling the org's broker • Introduction to the software "TrustLayer"
BUDGET / FINANCE	472 (email, phone call, video meeting)	330	• Budget modification (allowed 1x every 6 months) • Addressing surplus funds after the first year of the grant • Accounting ?s like how to classify expenses • How to charge employee time to different funding streams • Basic accounting principles, best practices, and guidelines
DATA REPORTING	65 (video meeting, in person)	46	• How to import their data into our software • Data clean-up • Disaggregating data if the org has 2 separate grants • Training / refresh training on how to access the data software
TRAINING and TECHNICAL ASSISTANCE	450 (phone call, video meeting, in person)	232	• Understanding and reporting progress toward milestones • Understanding budget line items & sticking to planned spending • Understanding the Statement of Work

The Grantee Lifecycle

Application Process

Contracting Process

Delivery of Services

Data & Reporting

Grant Success & Sustainable Organizations

EDUCATE & EMPOWER

How Grants Are Monitored Part 2

In-Depth Review Is Triggered When:

- Discrepancies continue after monitoring & meetings
- Risks are identified by Grant Advocate

In-Depth Review Process Includes:

- Focus on actual-to-budget spending
- Cash flow considerations
- Bank reconciliations
- Review of organization and administrative procedures

Outcomes:

- Findings - recommended improvements
- Corrective action (Performance Improvement Plan - PIP)
- Review clear deadlines and actions to avoid contract termination
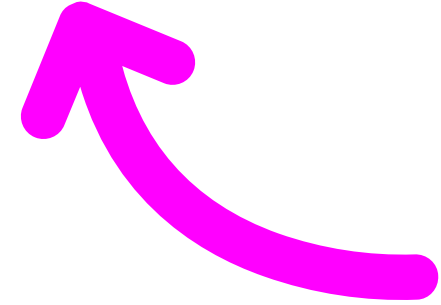
When Do Performance Improvement Plans Happen?

- When a Grantee has not responded to a recommendation for change or correction from their Grant Advocate, the Finance Team, and/or the Data Team, we initiate a meeting to discuss Performance Improvement.

- The meeting includes the Grantee, the TPA Program Director (Joann) and Operations Director, the Grant Advocate, and the Training & TA Coordinator.

- We review the Scope of Work, the Grantee's contract, their milestones, and their budget.

- The TA Coordinator sets up a series of video meetings to correct issues.

- We have diverted 4 Grantees from grant termination using PIPs.

When A Performance Improvement Plan Does Not Work…

Continued Communication:

- We continue emails and phone calls over a minimum of 30 days from the start of the PIP inviting the grantee to respond and work with us to address deficiencies.

Corrective Action Plan:

- Grantee must submit within 10 days. We continue reach outs via phone and email during that time.

Final Notice of Termination:

- Grantee receives a final 30 days to address deficiencies / submit corrective action plan.

Formal Termination Notice:

- Grantee submits a Final Budget Reconciliation
- Amity conducts an internal audit ensuring funds are spent / reallocated correctly.

EDUCATE & EMPOWER