**Task ID: GM004**

# Name: Sponsors

# Due Date: January 25, 2012

**Complexity**

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**Priority**

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**Resources:**

The following agency contacts should be involved in completing this task:

* Projects Manager
* Grants Manager

**Applicable Agencies:**

* All agencies using the Grants functionality in SMART

**Overview**

The Grants module provides a way to maintain information related to grants for the entire life-span of the grant, from pre-award to award to closeout. The pre-award functionality of the module is primarily related to the grant proposal development and approval process. During this phase, the grant application is developed and submitted to the federal agency (or other sponsor) for approval and award. Once awarded, the proposal will become the award and financial tracking and reporting can begin through the life of the grant. The Project Costing module is tightly integrated with Grants and is the module used to store the financial transactions related to the grant. In order to use the full functionality of the Grants module, a number of tables will need to be configured. In order to configure the system with information that best fits with your business needs we are requesting your assistance.

Agencies that want to use the pre-award functionality of the SMART system will use the Grants module to enter and track grant proposals. The Sponsor pages are the pages that store information about the organizations that fund your agency’s grants. The Sponsor pages of the Grants module provide a one-time data entry point that stores general grant sponsor information, including sponsor name, address, and specific guidelines. When an agency creates a proposal in the Grants module and a sponsor is selected, that sponsor’s information is automatically associated with the proposal and populates into reports.

Even if you are not using the Grants module for pre-award grant proposal development, you may still want to use it to track your grant post-award. The Grants module provides you with the ability to store information related to your sponsors and the general grant-related information that your grant managers need to conduct business. This type of information is typically static, except for dates, and is useful to have on hand in an electronic format for future grant proposal preparation, and to document A-133 compliance for the current grant award.

**What will the SMART Team do with this information:**

The SMART Projects/Grants Team will configure the Sponsor pages in the Grants module with values gathered from state agencies. This will provide the general grant sponsor information associated with an agency’s proposals.

**Action Required**

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| **1. Verify that Microsoft Excel has been loaded on your computer and is functional. You will need it to complete this task.** |

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| **2. Open the SMART Sponsor Template (GM004\_Sponsors.xls).** |

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| **3. Complete the Agency information on the “Questions” tab (Agency Name, Prepared By, Title & Email Address). This information will auto-populate on the other tabs.** |

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| **4. Answer the question on the “Questions” tab.** |

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| **5. Based on your answer to the question from the “Questions” tab, you may need to complete the various tabs. Please note the character guidelines on some of the fields.** |
| *On the “Sponsor General Information” tab, complete a listing of your agency’s grant sponsors, including their name, address (address 1, address 2, city, state and zip), phone number (optional), and Letter of Credit information. If a sponsor has more than one Letter of Credit ID, then capture it in a different row on the spreadsheet (see example for details).*  *On the “Sponsor Guidelines” tab, complete a listing of specific sponsor guidelines. The use of sponsor guidelines can be beneficial for quick reference and is optional.*   * *Sponsor Guidelines = Included are values that come delivered with the SMART system. Starting on Line 18, list any additional Sponsor Guideline values your agency needs to have in the system. If you configure sponsor guidelines, you will need to include a Guideline ID, Short Description, and Long Description.* * *Comments = Detailed comments associated with the Sponsor Guideline values in the previous column - see delivered comments for examples.*   *On the “Sponsor Guidelines Mapping” tab, complete a listing of sponsors associated with each guideline.*   * *Sponsor Guidelines = Starting on Line 17, list any Sponsor Guideline values your agency needs to have in the system that relate to specific sponsor(s). If you configure sponsor guidelines, you will need to include a Guideline ID, Short Description, and Long Description.* * *Comments = Detailed comments associated with the Sponsor Guideline values in the previous column - see delivered comments for examples.* * *Sponsor = Identify which of your agency's sponsors use each of the Guidelines listed in the previous columns (put "All" or "All Federal" if appropriate) - insert rows as needed.*   *If you have any questions while completing this task, you may contact the SMART*  *Projects/Grants Team at Sarah.Tongier@da.ks.gov. Please include “Grants Configuration” in the subject line of your email.* |

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| ***6. Save your final document.*** |
| *File Name = XXX\_GM003\_Sponsors*  *\*Replace XXX with your agency number.* |

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| ***7. Submit the final document.*** |
| *Once the task is complete, e-mail\* the finalized document to the SMART Projects/Grants Team at* [*Sarah.Tongier@da.ks.gov*](mailto:Sarah.Tongier@da.ks.gov)*.*  *\*Please include the Task Name and Agency in the subject line of your email.* |

**Supporting Materials & Resources:**

* Notice of awards for current grants
* Solicitations/Requests for Proposals your agency intends to apply for in the future
* General sponsor grantee guidelines/terms and conditions