



FLORIDA DEPARTMENT OF STATE / DIVISION OF

*Historical Resources*

# HOW TO MANAGE YOUR GRANT

Historic Preservation Grants Program



# GRANT PROGRAM OVERVIEW

# HISTORIC PRESERVATION GRANTS STAFF

## Grants Supervisor

Tim Knoepke, M.A., FCCM

## Grants Specialists

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Cody VanderPloeg, B.S.

DEPARTMENT OF STATE

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graph TD; A[DEPARTMENT OF STATE] --> B[DIVISION OF HISTORICAL RESOURCES (DIVISION)]; B --> C[HISTORIC PRESERVATION GRANTS PROGRAM];
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DIVISION OF HISTORICAL RESOURCES (DIVISION)

HISTORIC PRESERVATION GRANTS PROGRAM

# PROGRAM GOVERNANCE

- [Chapter 267.0617, Florida Statutes](#)
- [Chapter 1A-39, Florida Administrative Code](#)
- [Small Matching Grant Guidelines](#)
- [Special Category Grant Guidelines](#)

**Note: Rule and Program Guidelines undergo yearly revision.**

# GRANT PERIOD

## **Small Matching**

12 months (one state fiscal year)

July 1 – June 30

## **Special Category**

24 months (two state fiscal years)

July 1 – June 30 (year 2)

**NOTE:** Work undertaken or expenses incurred prior to the start of the Grant Period may not be covered by project funds.

# GETTING STARTED

# PROJECT FILE

Sections 20 and 21 of the Grant Award Agreement requires Grantees to maintain project records for a period of five (5) years after the close of the grant and provide them to the Division upon request.

- Such records include but are not limited to:
  - Grant Award Agreement
  - Financial documentation
  - Deliverable documentation
  - Electronic storage media
- If an organization has multiple grant projects, a separate grant file must be maintained for each project.



# ORGANIZATION PROFILE

- Applicants should verify that all information in the Organization profile is accurate, including the Staff List
- This list may be accessed by clicking “Manage staff” on the Organization Details page

## Test

[Request Account Association with Test](#)

[Edit Organization](#) | [Manage staff](#) | [Manage Relationships](#) | [Deactivate Organization](#)

Organization Information

Organization Applications

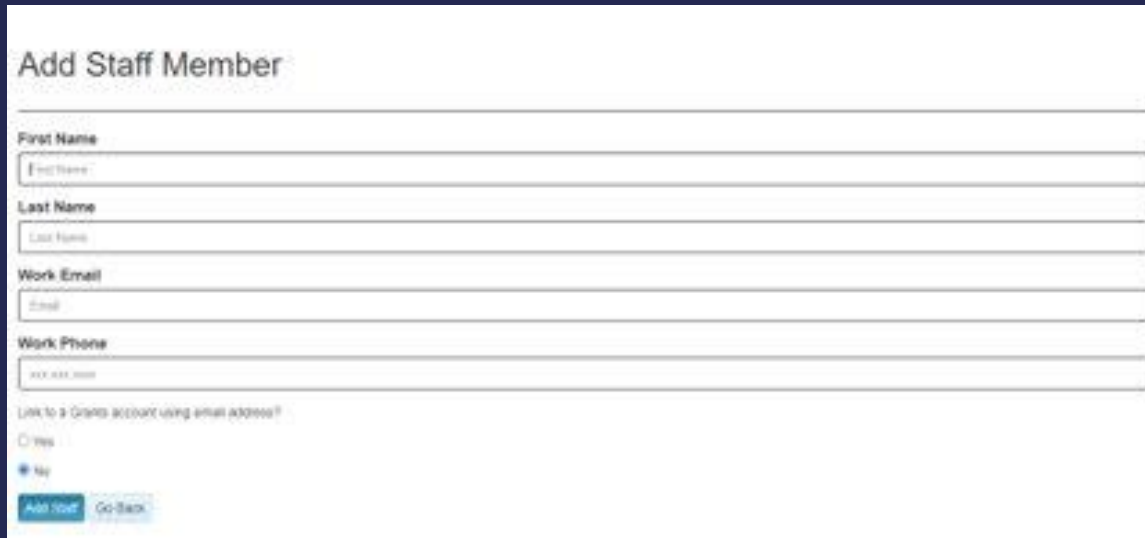
Organization Grants

Legal Name:	Test	FEIN:	00-0000000	DBA Name:	
Alternate Name:		Known By:		Vendor Sequence:	
Organization Purpose:	Community Organization	Organization Type:	Nonprofit Organization	County:	Not Selected
House District:		Senate District:		Congressional District:	
Email:		Phone:		Fax:	
TDD:		Website:		OCLC Symbol:	
Organization Status:	Pending	Status Effective Date:	4/26/2017		
DUNS:		Fiscal Year End Date:			
Archived Notes:					
Physical Address:					

# ADDING NEW STAFF

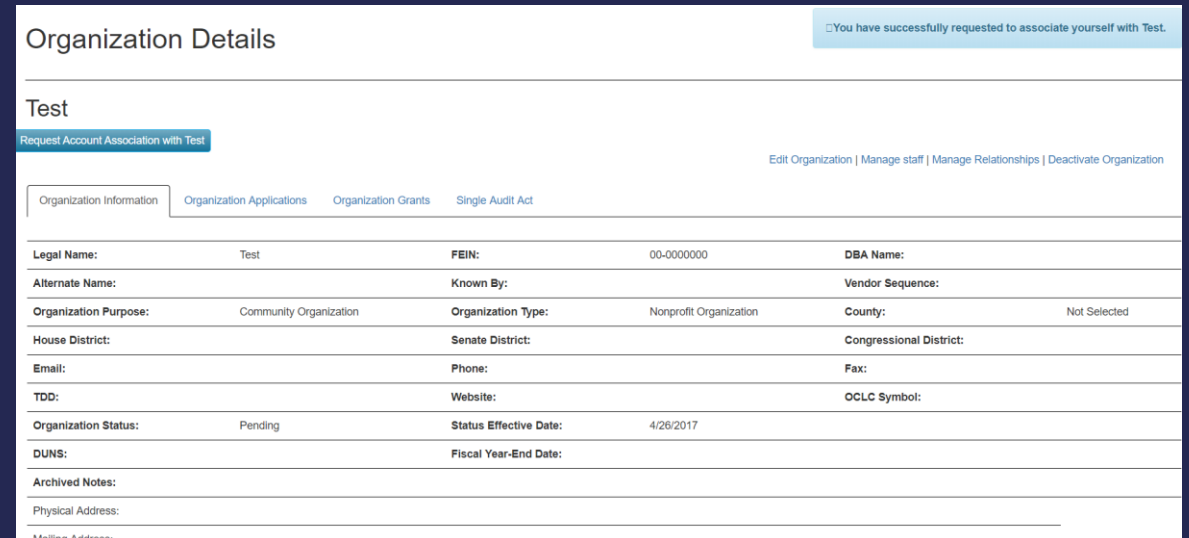
There are a two ways to add a new staff member. Both require the individual to have a dosgrants.com account.

1. Click on “Add new staff member” and follow system prompts



The screenshot shows a web form titled "Add Staff Member". It contains several input fields: "First Name", "Last Name", "Work Email", and "Work Phone". Below these fields is a checkbox labeled "Link to a Grants account using email address?". At the bottom of the form are two buttons: "Add Now" and "Go Back".

2. Have the individual request association



The screenshot shows a web page titled "Organization Details" for an organization named "Test". A blue notification banner at the top right states: "You have successfully requested to associate yourself with Test." Below the title is a navigation bar with links: "Request Account Association with Test", "Edit Organization", "Manage staff", "Manage Relationships", and "Deactivate Organization". The main content area is a table with various organizational details.

Legal Name:	Test	FEIN:	00-0000000	DBA Name:	
Alternate Name:		Known By:		Vendor Sequence:	
Organization Purpose:	Community Organization	Organization Type:	Nonprofit Organization	County:	Not Selected
House District:		Senate District:		Congressional District:	
Email:		Phone:		Fax:	
TDD:		Website:		OCLC Symbol:	
Organization Status:	Pending	Status Effective Date:	4/26/2017		
DUNS:		Fiscal Year-End Date:			
Archived Notes:					
Physical Address:					
Mailing Address:					


# ORGANIZATION ROLES

- Organization Manager
  - May edit Organization Details and add/edit staff; May view, edit, and submit all items on Grant Record Details
- Profile Editor (application oriented)
  - May edit Organization Details but may not access Grant Record Details
- Grant Editor (application oriented)
  - May edit Organization Details but may not access Grant Record Details
- Submitter
  - May edit Organization Details; May view, edit, and submit all items on Grant Record Details
- Viewer
  - May only view Organization Details and may not access Grant Record Details

# FINDING YOUR GRANT

FLORIDA DEPARTMENT of STATE

Cultural Affairs



[Home](#) [Account](#) [Organization](#) **[Grants](#)** [Panels](#) [Search](#) [Help](#)

[Apply for Grant](#)  
[My Organization Applications](#)  
[My Grants](#)

## My Dashboard

### My Current Applications

Application Nu...	Project Title	Program	Organization Name	Project Number	Status	Actions
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5 items per page

No items to display

# GRANT RECORD DETAILS

## Grant Record Details - 20.h.sc.100.023

[View Application](#) [Grant Status](#) [Activity Log](#) [Return to My Grants](#)

### Project Overview

Grant Number	FEIN	Grant Name	Project Number	Organization Name	Payment Address	Amount Paid	Grant Period	Award Amount
20.h.sc.100.023	59-0624401	Frank Lloyd Wright Polk County Science Building Planetarium Restoration		Florida Southern College		\$0.00	07/01/2019 - 06/30/2021	\$500,000.00

### Payments

[Request Payment](#)

Type of Payment	Payment	Invoice	ATTN	Payment Status	Date of Request	Invoice Period Begin Date	Invoice Period End Date	Date Request Approved	Date Paid	Payment Amount	Actions
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### Change Requests

Change Request #	Submitted Date	Last Modified By	Modified Date	Status	Actions
1	06/12/2020	Case Eric	06/12/2020	Approved and Amendment Created	<a href="#">View</a>

### Agreements and Amendments

Amendment #	Submitted Date	Last Modified By	Modified Date	Status	Actions
1				Amendment Created	<a href="#">Review Amendment</a>

### Progress Reports

Progress Report Type	Due Date	Submitted Date	Last Modified By	Modified Date	Status	Actions
Progress Report #1 (7/1/2019-9/30/2019)	10/31/2019	10/24/2019	Laura Bright Houston	10/25/2019	Approved	<a href="#">View</a>
Progress Report #2 (10/1/2019-12/31/2019)	01/31/2020	01/22/2020	Laura Bright Houston	01/22/2020	Approved	<a href="#">View</a>
Progress Report #3 (1/1/2020-3/31/2020)	04/30/2020		Database Administrator	04/01/2020	Preparing	<a href="#">Edit</a>

### Forms and Reports


Description	Due Date	Submitted Date	Last Modified By	Modified Date	Status	Actions
Expenditure Log		10/24/2019	Ellis, Kathy	10/24/2019		<a href="#">Edit Log</a>
Contract Form		8/5/2019	Bright Houston, Laura	8/5/2019	Executed	<a href="#">View Contract</a>
Contract Details Form		8/5/2019	Bright Houston, Laura	8/5/2019	Approved	<a href="#">View</a>

### Contact Information

# GRANT AWARD AGREEMENT

# CONTRACT DETAILS REVIEW

- After notice of award, Grantees will be contacted by a Division Grants Specialist to review contract details
- Grantees should email the Division Grants Specialist if revision is needed
- Once contract details are confirmed, the Grant Award Agreement is released for signing



Deliverables					
Budget					
Scope of Work					
Contact Info					
Payment Nu...	Payment Type Code	Deliverable Nu...	Deliverable Description	Documentation	Payment Amo...
			G703), or their equivalents, showing at least thirty percent (30%) of the project completed to the Division for review and approval.	G703), or their equivalents, showing at least thirty percent (30%) of the project completed	
2	Fixed Price	2	Submit a completed Application and Certificate for Payment (AIA Document G702) and Schedule of Contract Values (AIA Document G703), or their equivalents, showing at least sixty percent (60%) of the project completed to the Division for review and approval.	A completed Application and Certificate for Payment (AIA Document G702) and Schedule of Contract Values (AIA Document G703), or their equivalents, showing at least sixty percent (60%) of the project completed	\$150,000.00
3	Fixed Price	3	Submit a completed Application and Certificate for Payment (AIA Document G702) and Schedule of Contract Values (AIA Document G703), or their equivalents, showing at least one hundred percent (100%) of the project completed, including all retainage amounts paid, to the Division for review and approval. In addition, a Single Audit Form and new/updated Florida Master Site File form for the property shall be completed by the Grantee and submitted along with the Final Progress Report to the Division for review and approval prior to final payment.	A completed Application and Certificate for Payment (AIA Document G702) and Schedule of Contract Values (AIA Document G703), or their equivalents, showing at least one hundred percent (100%) of the project completed, including all retainage amounts paid; Single Audit form; New/Updated Florida Master Site File Form; Final Progress Report	\$200,000.00
					Total: \$500,000.00

1 - 3 of 3 items

# WHAT IS THE GAA?

The Grant Award Agreement is a legally binding document between the Grantee and the Division. It contains important information and stipulations that serves as a guide during the grant period

- Sections of note:
  - Section 1.a. Scope of Work
  - Section 1.b. Deliverables
  - Section 2. Length of Agreement
  - Section 4. Payment Policies
  - Section 8. Financial Consequences
  - Section 9. Special Conditions
  - Section 11. Encumbrance
  - Section 12. Reporting Requirements (with deadlines)
  - Section 15. Extension Policies
  - Section 36. Procurement Requirements



# GAA EXECUTION

- Allow for time in the project schedule to review and sign the Grant Award Agreement
- Special Category projects must execute and file [Restrictive Covenants](#)
  - Fill in all blanks
  - Include an Attachment/Exhibit A – choose boundaries wisely
  - Must be **notarized** and **filed with county clerk**
  - Payment cannot be made before the Restrictive Covenant has been filed
- Once the Division has received a signed and dated copy of the Grant Award Agreement with any/all accompanying required documents, it will take 1-2 weeks for execution

# ENCUMBRANCE & PROCUREMENT

# PROCUREMENT REQUIREMENTS

Section 36: Grantees must conduct an open, competitive procurement process for goods and/or services in accordance with [Section 287, Florida Statutes](#) and [Chapter 60A-1.002, Florida Administrative Code](#)

- Purchases up to \$2,500
  - Carried out using good purchasing practices
- Purchases between \$2,500 - \$35,000
  - Written quotations
  - Written records of telephone quotations
  - Informal bids
- Purchases \$35,000 and over
  - Formal invitation to bid (ITB)
  - Request for proposals (RFP)
  - Invitation to negotiate (ITN)

NOTE: All contract documentation must be reviewed and approved by the Division prior to execution.

# PROCUREMENT REQUIREMENTS

- If using a continuing services contract, Grantees may forgo a new bid process by submitting the following:
  - Proof the services were initially procured in accordance with Florida Statutes
  - Original continuing services contract
  - Vendor qualifications
- If approved, the Grantee must provide a copy of the work order, task authorization, acceptance of proposal, etc. that is specific to the grant project

**NOTE:** All contract documentation must be reviewed and approved by the Division prior to execution.

# ENCUMBRANCE REQUIREMENTS

Section 11: A binding contract for all or part of the Scope of Work must be executed by September 30

- An extension may be requested via email that includes the following:
  - Reason for extension
  - Requested extension date
  - Timeline/plans for achieving encumbrance
- For those projects not involving contract services, the Department and Grantee shall consult on a case-by-case basis

NOTE: All contract documentation must be reviewed and approved by the Division prior to execution.

# ENCUMBRANCE REQUIREMENTS

- What the Division looks for in Encumbrance documents:
  - Outline of Scope of Work as identified in the GAA
  - Timeline and/or projected work completion date
  - Cost of goods/services corresponding to amount(s) listed in GAA Budget
- Acceptable documentation:
  - Purchase orders
  - Acceptance of vendor proposals
  - Task authorizations
  - Work orders
  - Contract/Agreement

**NOTE:** All contract documentation must be reviewed and approved by the Division prior to execution.

# PROGRESS REPORTS

# THE REPORT

Section 12: Quarterly progress reports must be submitted in dosgrants.com, documenting the following:

- Project activities
- Incurred expenses
- Completion of deliverables/work items
- Examples of appropriate attachments
  - Meeting minutes/correspondence relating to project
  - Encumbrance documentation
  - Deliverable documentation
  - Photographs adhering to [Division Photograph Submission Guidelines](#)
- If expenses have been incurred, Grantees are encouraged to update the Expenditure Log



# HOW TO SUBMIT A PROGRESS REPORT

Progress reports are accessible from the Grant Record Details page at the beginning of the month in which they are due

Progress Report

Historic Preservation Grant Program

Division of Historical Resources

Grant:

20.h.sc.100.085

Grantee Organization:

Florida Trust for Historic Preservation

Project Title:

Re-roofing and partial repainting of the Hays-Hood House

Date Submitted:

Progress Report #4  
(4/1/2020-6/30/2020)

Instructions:

- Use the 'Grant Progress' text area to describe your project narrative and progress of your project to this point.
- Describe the progress of the project since the last reporting period including:
  - The progress and status of each scope of work activity
  - The progress and status of the deliverables
- Indicate any variations from project timeline, budget, and deliverables and provide reasons for the variance.
- Please provide evidence of progress using the 'Upload' section. Include a Title and Description which properly describes what the document consists of.
- You may use the upload section to instead upload a word document describing your progress. If you do so, please use the text area to list the title of the document with your grant progress narrative.
- Note: Development projects need to provide progress photographs with the Progress Report. Photographs must be submitted per photographic submission guidelines.

Grant Progress:

B

I

Expenditures:

Please complete and submit your expenditure log using the following link:[Expenditures](#)

Progress Report Documentation:

Title

Description

B

I

Upload a file

Select file

Signature:

☐ I hereby certify that I am authorized to submit this progress report on behalf of Florida Trust for Historic Preservation and that all information indicated is true and accurate. I acknowledge that my electronic signature below shall have the same legal effect as my written signature. I am aware that making a false statement or representation to the Department of State constitutes a third degree felony as provided for in s. 817.155, F.S., punishable as provided for by ss. 775.082, 775.083, and 775.084.

Electronic Signature

Save

Submit

Go Back

# THE EXPENDITURE LOG

The Expenditure Log is accessible from the Grant Record Details page

- Select “Add new record” to enter a new expense

Organization Name	Grant #	Award Amount	Date Completed
City of St. Augustine	20.h.fh.100.002	\$100,000	1/14/2020 10:48:25 AM

Link to Contract Details

+ Add new record

Export to Excel

Drag a column header and drop it here to group by that column

Invoice	Transaction	Payment ...	Payee	Transactio...	Grant Funds	Cash Match	In Kind	Budget Item	Description	Deliver...	Status	

				Total Transacti...	Total Grant Funds:	Total Cash Match:	Total In Kind: \$0.00					
				\$0.00	\$0.00	\$0.00						

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200 ▼ items per page

No items to display ↻

# HOW TO FILL OUT THE EXPENDITURE LOG

- Invoice #
- Transaction #
- Payment date
- Payee
- Transaction total
- Grants funds
- Cash match
- In-kind services
- Deliverable
- Budget item
- Description

The screenshot displays the 'Edit' modal form for the Expenditure Log. The background shows a table with columns: Invoice, Transaction, Payment Date, Payee, Transaction Total, Grants Funds, Cash Match, In-Kind Services, Deliverable, Budget Item, and Description. The 'Edit' modal is a light blue window with a close button (X) in the top right corner. It contains the following fields and controls:

- Invoice**: Text input field.
- Transaction**: Text input field.
- Payment Date**: Text input field with a date format mask (MM/DD/YYYY).
- Payee**: Text input field.
- Transaction Total**: Text input field with a numeric keypad icon.
- Grants Funds**: Text input field with a numeric keypad icon.
- Cash Match**: Text input field with a numeric keypad icon.
- In-Kind Services**: Text input field with a numeric keypad icon.
- Deliverable**: Dropdown menu.
- Budget Item**: Dropdown menu.
- Description**: Rich text editor with a toolbar containing buttons for Format, Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Image, and Table. Below the toolbar is a large text area for the description.
- Status**: Text label showing 'New'.
- Buttons**: 'Update' (with a checkmark icon) and 'Cancel' (with a close icon) buttons at the bottom right.

The background table has a row with the following values: Invoice, Transaction, Payment Date, Payee, Transaction Total, Grants Funds, Cash Match, In-Kind Services, Deliverable, Budget Item, and Description. The 'Deliverable' column contains the value '0'. The 'Status' column contains the value 'New'. The table has a pagination bar at the bottom showing '1 - 1 of 1 items' and a refresh icon.

# EXPENDITURE LOG

- Once “Update” is clicked, an entry is created with the status “New” and is viewable by Division staff
- Expenditure Log entry statuses:
  - New – entry is editable by the Grantee and has not been submitted
  - Submitted – entry no longer editable and is ready for Division review
  - Returned – Division Grants Specialist has returned entry to Grantee for editing

# CREDIT LINE REQUIREMENT

Section 10: When publicizing, advertising, or describing sponsorship of the project, the following statement must be included:

This project is sponsored in part by the Department of State, Division of Historical Resources and the State of Florida.

- Section 10 adherence:
  - Non-site-specific projects
    - Press release
    - News article
    - Deliverable documentation
    - Project sign
  - Site-specific projects
    - A project sign must be installed and a photo subsequently submitted to the Division
    - The sign must be legible and durable
    - Grant funds can be used towards purchase

NOTE: The DHR logo is available upon request

# PAYMENT REQUESTS

# REQUESTING PAYMENT

Section 4: All payment requests are submitted via [dosgrants.com](https://dosgrants.com)

- To be eligible for payment, Grantees must have completed one or more Deliverables and provide the Deliverable documentation listed in Section 1b of the GAA
  - Deliverables also listed in the Contract Details Form in [dosgrants.com](https://dosgrants.com)
- Grantees may request payment periodically throughout the Grant Period or at its conclusion
  - NOTE: If drafts are required as Deliverables, it is recommended that these are submitted for Division review before the end of the Grant Period. Grantees will be required to complete any necessary revisions prior to receiving payment and will be responsible for any associated costs if the Grant Period has ended. Otherwise, financial consequences may be enacted, resulting in a payment reduction.

# HOW TO REQUEST PAYMENT

Payment requests are accessible from the Grant Record Details page

- Select completed Deliverable(s)
- Enter invoice period
- ATTN – name of individual at Grantee organization
- Attach all Deliverable documentation for which payment is being requested

Payment Request #2

Fields with an asterisk\* are required on submission

[My Grants](#) | [Expenditure Log](#) | [Return to Grant Record Details](#)

Project Overview

Grant Number	FEIN	Grant Name	Project Number	Organization Name	Payment Address	Amount Paid	Grant Period	Award Amount
			null			\$0.00	7/1/2019 - 6/30/2020	\$50,000.00

Payment request: (Fixed Price)

Select one or more deliverables for this payment\*

<input type="checkbox"/> Select All	Deliverable Number	Deliverable Amount	Deliverable Description	Documentation
<input checked="" type="checkbox"/>	1	\$15,000.00	Provide five (5) completed survey forms and one (1) copy of the survey timeline to the Division for review and approval.	Five (5) completed survey forms; and one (1) copy of the survey timeline to the Division for review and approval.
<input type="checkbox"/>	2	\$15,000.00	Provide one (1) electronic copy of the draft survey report to the Division for review and approval. The survey report shall conform to Chapter 1A-46, Florida Administrative Code.	One (1) electronic copy of the draft survey report to the Division for review and approval. The survey report shall conform to Chapter 1A-46, Florida Administrative Code.
<input type="checkbox"/>	3	\$20,000.00	Provide one (1) electronic and one (1) hard copy of the minimum of five hundred (500) FMSF forms, including photographs and maps; one (1) electronic and one (1) hard copy of the final survey report, conforming to Chapter 1A-46, Florida Administrative Code. In addition, a Single Audit Form shall be completed by the Grantee and submitted along with the Final Progress Report prior to final payment.	One (1) electronic and one (1) hard copy of the minimum of five hundred (500) FMSF forms, including photographs and maps; one (1) electronic and one (1) hard copy of the final survey report, conforming to Chapter 1A-46, Florida Administrative Code. A Single Audit Form; a Final Progress Report.

Payment Details (Fixed Price)

Invoice Period Begin Date:\*

Invoice Period End Date:\*

ATTN:

Notes

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Payment Documentation

Select the "Add new file" button to upload payment documentation.

[+ Add new file](#)

Title	Description	Choose File
<div>No items to display</div>		

[Save](#) [Submit](#)



# THE PAYMENT PROCESS

- Once a payment request has been submitted, Grantees should notify their Division Grants Specialist
- Division staff may request submission of the Expenditure Log and all project financial documentation to date
- Division staff will review Deliverable and Financial documentation and, if approved, submit the request to Finance for processing
- Finance will review the request and send it to the Department of Financial Services for disbursement

# PAYMENT TRACKING AND RECEIPT

- Funds are provided either by check or direct deposit
  - Section 5: Grantees must complete a [Direct Deposit Authorization form](#) to receive funds electronically
- Grantees may check on the status of their request on:
  - Grant Record Details page
  - [Florida Accounting Information Resource](#)
- Payment request review, approval, and processing timeline
  - Small Matching: 3-5 weeks
  - Special Category: 5-7 weeks

# WHEN PAYMENTS ARE NOT APPROVED

- Deliverable documentation not provided
- Incorrect Deliverable documentation provided
- Deliverable documentation incomplete or in need of revision
- Non-allowable costs included in incurred expenses
- Grantee organization in non-compliance

# REMINDER OF NON-ALLOWABLE EXPENDITURES

## Section 16: Nonallowable grant expenditures include but are not limited to:

- Work that does not comply with the Secretary of the Interior's Standards (as applicable)
- Work completed outside of the grant period or Scope of Work
- Entertainment, food, beverages, plaques, awards, or gifts
- Total administrative and project management costs exceeding 5% of the grant funds requested
- Indirect costs, i.e. costs that are not readily identifiable as expenditures for the materials and services required to complete the Scope of Work
- Activities related to the interiors of religious properties
- Furniture and equipment
- Attending/hosting conferences, summits, workshops, or presentations
- Tuition waivers, fees, and other non-grant related costs associated with employing students
- Travel expenditures, including those of personnel responsible for items of work approved by the Division, administrative personnel, or (sub)contracted employees, either for purposes of work on-site or research off-site

**NON-COMPLIANCE**

# NON-COMPLIANCE

Section 24: Grantees who have not satisfied administrative requirements will be placed in non-compliance. This may include failures to:

- Meet deadlines
- Submit required documentation
- Make required revisions or corrections
- Respond to Division requests for information in a timely manner
- Complete work in accordance with SOI Standards and/or the agreed upon Scope of Work
- While in non-compliance:
  - Status applies to entire organization
  - Payment of funds suspended for all Department of State grants
  - Organization unable to request payment or apply for additional grants
- Failure to resolve non-compliance may lead to:
  - Mandatory return of portion or entire amount of Grant Award
  - Grant termination
  - Organization prohibited from applying for future grants with Division or other Department of State Divisions

# AMENDMENTS

# AMENDING THE GAA

Section 7: Either party (Grantee or Division) may request modification to the contract details. Agreed upon changes are only valid when in writing, signed by all parties, accompanying the original agreement, and submitted through [dosgrants.com](https://dosgrants.com)

- If an amendment is needed, Grantees should first email their Division Grants Specialist and include the following:
  - Reason for amendment
  - Proposed changes



# EXTENSION AMENDMENTS

Section 15: Extension of the completion date may be requested up to 30 days prior to the Grant Period end date

- Small Matching Grants

- Extension may not exceed 30 days, unless the Grantee can clearly demonstrate extenuating circumstances
  - These do not include failure to read or understand administrative requirements or to raise sufficient matching funds
  - The Division will review requests on a case-by-case basis
- Pursuant to [Section 216.301\(1\)\(b\), Florida Statutes](#), the Division has until September 30 to review, process, and disburse Small Matching grant payments before funds are rescinded

- Special Category Grants

- Extension may not exceed 120 days, unless the Grantee can clearly demonstrate extenuating circumstances

# AMENDMENT PROCESS

- Initiate Change Request from Grant Record Details page
- Select Reason for Request
- Enter brief Reason for Changes and Description
- Follow system prompts
- Notify Grants Specialist when request submitted
- Grants Specialist will review, edit, return, and/or approve request and provide amendment
- Grantee must sign and date amendment and return to Division for execution

## Create Change Request

Grant Number: 20.h.sm.200.091  
Award Amount: \$50,000.00

Organization: City of Delray Beach  
[View Application](#) | [View Original Contract/Amendment](#)

Project: Delray Beach 5 District Historic Resource Survey

All items marked with an asterisk(\*) are required

### 1. Reason For Request (Check all that apply)\*

- ☐ Change to contract Scope of Work
- ☐ Change to Deliverables
- ☐ Contract extension request
- ☐ Revision to activities or timeline
- ☐ Changes to project impact/service outcomes
- ☐ Change in overall project cost/funding level
- ☐ Transfer among budget categories
- ☐ Change in equipment to be purchased
- ☐ Change in key personnel
- ☐ Contracting out, subgranting or otherwise obtaining services of a third party to perform central project activities
- ☐ Change to contract terms/conditions
- ☐ Change to contact information
- ☐ Other

### 2. Do these changes impact your budget?\*

☐ Yes ☐ No

### 3. Reason for Changes\*

Provide the reason for the change request.

Rich text editor with formatting options (Bold, Italic, Bulleted List, Numbered List, Link, Unlink) and a text area for input.

### 4. Description\*

Describe the change and provide any relevant information. This may include any modifications to grant activities, timeline, personnel, outcomes, or a revised project narrative.

Rich text editor with formatting options (Bold, Italic, Bulleted List, Numbered List, Link, Unlink) and a text area for input.

### 5. Add Supporting Documents

Select files...

[Save](#) [Continue](#) [Return to Grant Details](#)

CLOSE-OUT

# CLOSING OUT THE GRANT

Section 14: All expenses must be incurred and the Scope of Work completed by the Grant Completion Deadline

- Grantees have the following 30 days to submit all close-out documentation
  - Final payment request
  - All Deliverable documentation
  - Completed Expenditure Log
  - Final progress report
  - Florida Single Audit Act form
  - All financial backup documentation (e.g. invoices, cancelled checks, [timesheets](#), receipts, etc.)
  - Check for accrued interest on advanced/invested funds, if applicable

# ACCRUED INTEREST

Section 23: Grantees may temporarily invest any or all grant funds received but not expended in an interest-bearing account

- Interest accrued less than \$100 may be held until it totals more than \$100, at which point it must be submitted to the Division by way of a check made out to the Department of State
- Any remaining interest accrued and not paid to the Division must be submitted at the end of the Grant Period by way of a check made out to the Department of State

# MANAGING EFFECTIVELY

# DO'S AND DON'TS OF GRANT MANAGEMENT

## DO

- Thoroughly review the GAA
- Follow procurement requirements per Section 287.057, Florida Statutes
- Select historic preservation professionals (as applicable)
- Adhere to the Secretary of the Interior's Standards
- Track volunteer and/or grant administration hours
- Communicate consistently with Division Grants Specialist

## DON'T

- Start work before July 1
- Execute contracts before they are reviewed by the Division
- Start work before the Division has reviewed and approved architectural drawings/specifications
- Perform tasks outside of the Scope of Work
- Miss deadlines
- Forget to keep a complete grant file

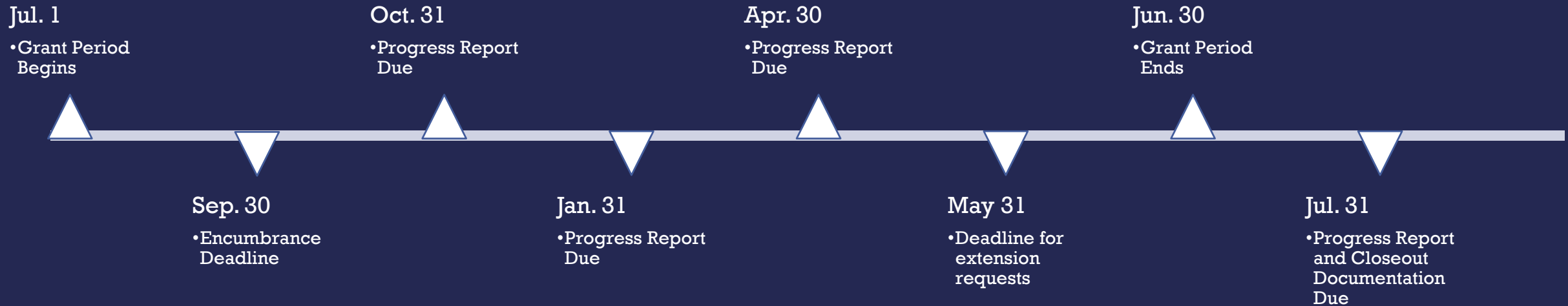
# SOURCES TO CONSULT FREQUENTLY

- Your Division Grants Specialist
- Grant Award Agreement
- [Small Matching Grant Guidelines](#)
- [Special Category Grant Guidelines](#)
- [Guidelines for Submitting Photographs](#)
- [FMSF Document Submission Guides](#)
- The How to Manage Your Grant Presentation



# GRANT PERIOD TIMELINE

## SMALL MATCHING



# GRANT PERIOD TIMELINE

## SMALL MATCHING AND SPECIAL CATEGORY

GRANT PERIOD START DATE	JULY 1, YEAR 1
ENCUMBRANCE DEADLINE	SEPTEMBER 30, YEAR 1
PROGRESS REPORT 1	OCTOBER 31, YEAR 1
PROGRESS REPORT 2	JANUARY 31, YEAR 1
PROGRESS REPORT 3	APRIL 30, YEAR 1
SM EXTENSION REQUEST DEADLINE	MAY 31, YEAR 1
SM GRANT PERIOD END DATE	JUNE 30, YEAR 1
PROGRESS REPORT 4 SM CLOSEOUT DOCUMENTATION	JULY 31, YEAR 1
PROGRESS REPORT 5	OCTOBER 31, YEAR 2
PROGRESS REPORT 6	JANUARY 31, YEAR 2
PROGRESS REPORT 7	APRIL 30, YEAR 2
SC EXTENSION REQUEST DEADLINE	MAY 31, YEAR 2
SC GRANT PERIOD END DATE	JUNE 30, YEAR 2
PROGRESS REPORT 8 SC CLOSEOUT DOCUMENTATION	JULY 31, YEAR 2

# CONTACT INFORMATION

## **Division Contact:**

1.800.847.7278 or 850.245.6333

## **Historic Preservation Grants Supervisor:**

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## **Physical Address:**

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## **Historic Preservation Grants Program Email:**

[DHRGrants@dos.myflorida.com](mailto:DHRGrants@dos.myflorida.com)

## **Department of State Online Application and Grants System:**

[DOSgrants.com](http://DOSgrants.com)

FLORIDA DEPARTMENT OF STATE  
DIVISION OF  
*Historical  
Resources*



[flheritage.com](http://flheritage.com)