Cityspan Guidance for Grantee Contracting Meeting
June 15, 2022

Contents

OFCY and Cityspan is excited to present the newly designed Grant Management System (GMS) for the FY2022-2023. The system retains many of the functions and features of the old system but with a new design and user interface. Some parts of the system are still being built out and tested and will be released in stages. This guidance pertains to the sections needed to get grantees into contract with the City of Oakland, Oakland Fund for Children and Youth.

Agency Users

The Executive Director and Proposal Contact listed in the RFP program application have had user accounts at the Agency Admin role created for them. They can create, inactivate and change the role of all users for this agency.

There are three roles of Agency User Accounts:

Agency Admin

- Has access to everything in the system for all programs funded under an agency.
- Only user role that can 1) Submit the Agency Documents, 2) Sign & Submit the Scope of Work and 3) Sign & Submit the Quarterly Progress Report.
- Only user role that can create and manage User Accounts.
- Limit the number of Agency Admin user accounts to only those staff who have the organizational authority to negotiate Scope of Work and submit Quarterly Progress Reports including invoices.

Program User (SOW & Services)

- Can be given access to one or more programs funded under the Agency.
- Can work in and submit individual SOW forms (Program Information, Budget, Service Projections, Populations & Geography) but cannot Sign & Submit the Scope of Work.
- Can work in Agency Documents but cannot submit it.
- Can work in and submit individual Quarterly Progress Report forms (Narrative, STATS, Invoice, Match Report) but cannot Sign & Submit the overall Quarterly Progress Report.
- Cannot create or manage User Accounts.

Program User (Services Only)

- Can be given access to one or more programs funded under the Agency.
- Only has access to Participants, Activities, Locations.

Agency Documents

NEW! OFCY is using Cityspan GMS to collect the documents necessary for executing the grant agreement starting in FY2022-2023.

Choose correct Cityspan GMS cycle that your program is in: Summer 2022 or FY2022-2023. It should be defaulted to your GMS cycle. **However, if your Agency has programs funded under both the FY2022-2023 and Summer 2022 GMS cycles, they must complete the Agency Documents twice, once for each cycle.** The Summer 2022 and FY2022-2023 grant agreements have different term dates.

- Grantees are only responsible for completing and submitting **Step 1 Agency Documents**. Grant Managers will complete and submit Steps 2 and 3. They are read-only for grantee.
- The contract must be fully executed before a grantee can Sign & Submit a Quarterly Progress Report. Grant Managers will upload the executed contract in the Executed Contract tab. Once submitted, the grantee can download a copy of the file here.

Agency Documents Review Process

- Once you submit the completed Agency Documents, the assigned Grant Manager and the Agency Admin user who submitted will receive an email receipt of submission.
- The Grant Manager will review the Agency Documents and either Approve or Disapprove.
  - If Approved, you are done with Agency Documents.
  - If Disapproved, you will need to address the Grant Manager's reasons for disapproval. Agency Documents will be automatically unlocked for your revision and resubmission.
- Once Agency Documents has been approved by the Grant Manager, it cannot be unlocked. If an issue arises that needs alternative documents, it will be managed outside of the GMS through email.

Scope of Work - Version 1

The Scope of Work – Version 1 will be the basis of the Grant Agreement between your Agency and the City of Oakland. The Service Projections (Schedule A) and Budget (Schedule B) will be included as part of the grant agreement packet.

- Click on a specific Program to access the Scope of Work (SOW) tab. The SOW consists of four forms and Sign & Submit.
- The RFP data appears twice: 1) In the RFP Data as read-only and; 2) In Version 1 for you to review, revise as needed, and submit the SOW.

Scope of Work Review Process

- Once you Sign & Submit the completed Scope of Work, the assigned Grant Manager and the Agency Admin user who Signed & Submitted will receive an email receipt of submission.
- The Grant Manager will review the Scope of Work and either Approve or Disapprove.
  - o If Approved, you are done with Version 1 of the SOW.
  - o If Disapproved, you will need to address the Grant Manager's reasons for disapproval. All SOW forms will be automatically unlocked for your revision and resubmission.

Future SOW Modifications through Versioning

Grantees may request to modify their Approved SOW Version 1 through future Versioning. The number of modification requests will be limited and must occur prior to the start of Quarter 4. Version 2 will not be available until the Progress Report tab is finalized.

Service Projections

The RFP Service Projections data has been copied over into the SOW. This is a structural change on how the grantee and OFCY will measure Projections to Actuals. In the past, each unique activity created in the Cityspan (GMS) Grant Management System had projections associated with it. Each of these activity projections would roll up into the SOW-Activities Summary. In FY22-23, Service Projections are at the SOW level with the grantee having the ability to link one or more activities to a single Service Projection.

Two Additional Forms to Complete

Agency Information

RFP data has been copied over into the Agency Information form. Pease review for accuracy, revise if necessary, and submit.

Program Contact Information

OFCY uses this form to see who to contact for specific purposes and to generate email distribution lists. Enter contact information for Executive Director/CEO, Program Representative, Contract Representative, Additional Contacts. This form can be unlocked at any time to update contact information if there are staffing transitions.

Also enter the Mailing Address for OFCY Invoice Checks. This address must be what is in the iSupplier system. The City of Oakland Fiscal Department will mail out checks only to the address on record in iSupplier.