

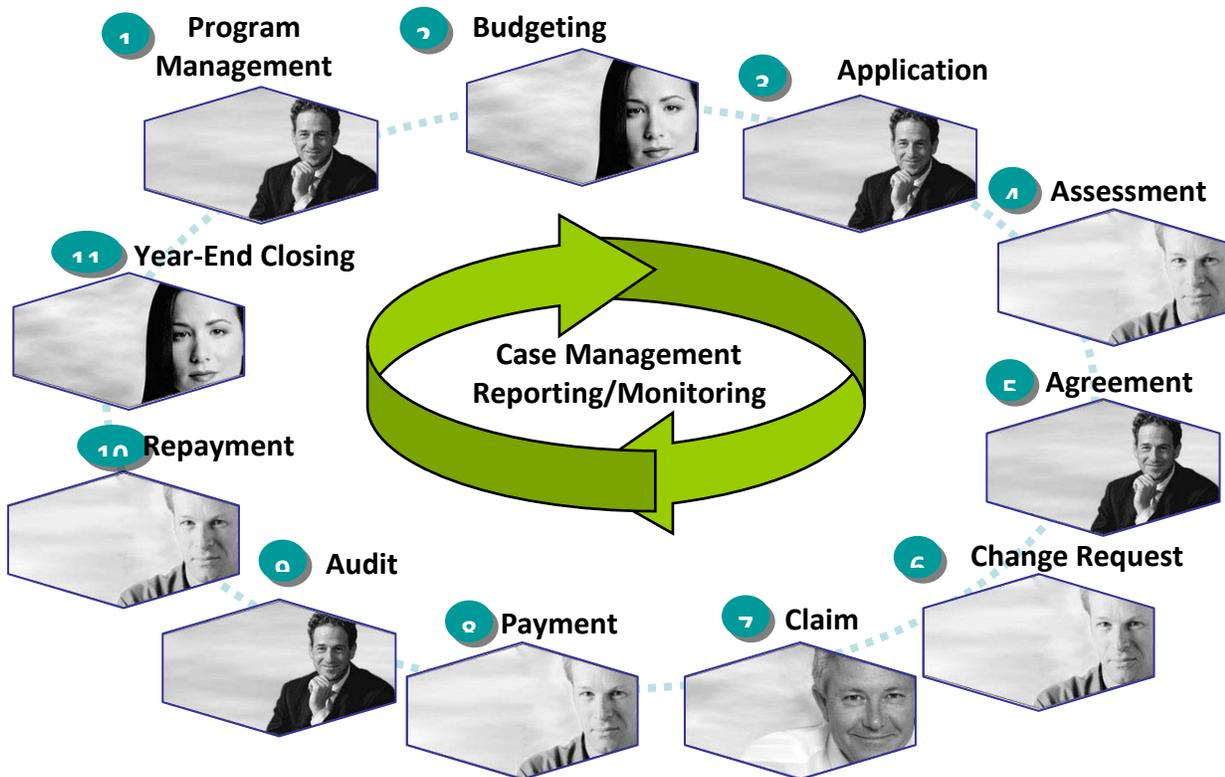


State of Louisiana

Agency Grantor Management Structure Guidelines

LaGov Project

Grantor Management – Processes



Purpose

The purpose of this document is to provide instructions that will assist Agency personnel in creating their Grantor Programs. Within SAP there are two grant modules: **Grantee Management** where monies are granted from an outside source (Federal or Private) to the state and **Grantor Management** where the state grants monies to 3rd parties such as parishes, school boards, and universities. Funding for Grantor Management Programs originate either with the state (purely state funded Grantor Programs) or with pass-through funds. Pass-through funds are funds granted to the state from an outside source (Federal or Private) which the state in-turn grants out to 3rd parties.

- Please note that only the following four (4) State entities will be included in the pilot Grantor Management solution: The Department of Transportation and Development (DOTD), The Department of Education (DOE) – with exceptions, The Louisiana Board of Regents (LBOR), and The Office of Community Development (OCD) – LGAP and CWEF programs.



State of Louisiana

Agency Grantor Management Structure Guidelines

LaGov Project

SAP Grantor is composed of two (2) major building blocks:

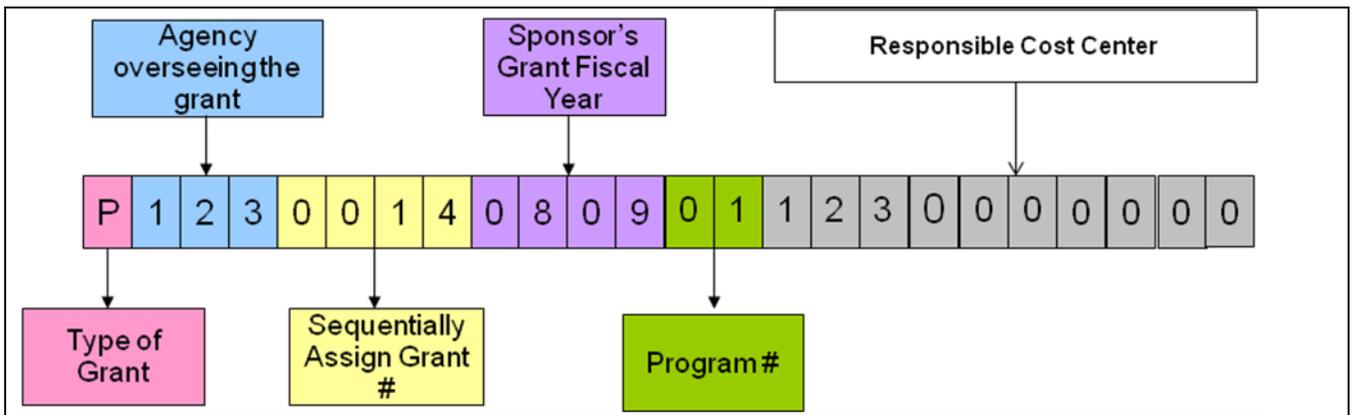
- The SAP CRM (Customer Relationship Management) system that supports the execution of the different operational processes of grants management. This includes program preparation, applications, agreements, claims, and monitoring activities.
- The SAP ECC system in which financial objects that are relevant for the financial execution of the Grantor Program Management process are stored. This includes budgets, commitments, payments, etc.

Grantor Programs

Two kinds of Grantor Programs will be created in the SAP CRM grantor solution framework. They are:

Pass-through Grantor Programs

Pass-through Grantor Programs are primarily funded by non-state sources like federal government agencies, non-profit foundations, etc. The Grantee Management (GM) module in SAP will first capture the pass-through program through Sponsor Dimensions such as Sponsor, Grant, Sponsored Programs, and Sponsored Classes and will be uniquely identified by their respective ID's. Pass-through Grantor Programs are represented in SAP with the following numbering format:





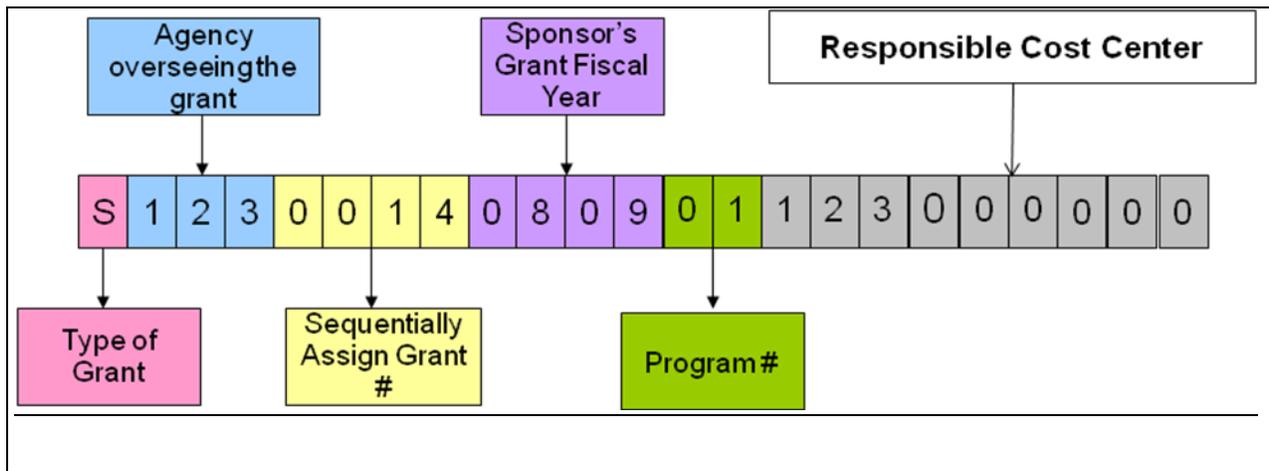
State of Louisiana

Agency Grantor Management Structure Guidelines

LaGov Project

State Funded Grantor Programs

State Funded Grantor Programs will be created in the CRM grantor solution. State Funded Grantor Programs are solely funded with state dollars which the State legislature designates as funds to be awarded as grants to 3rd parties. The following numbering format will be used to represent State Funded Grantor Programs:



Business Partner Definitions

Business Partners are Applicants, Vendors, Contact Persons, and Employees with whom the State of Louisiana does grantor relevant interactions like Applications, Agreements, and Claims. *Business Partners* are any parties in which the State has a business interest. Agencies will create Applicants and Contact Persons directly in CRM; whereas, Vendors and Employees will have to be copied from ECC to CRM via a custom transaction.

- Business partners are broken down into two categories – **Person** and **Organization**.
- The business partner category “**person**” will include the following roles – **Employee** and **Contact Person**.
- The business partner category “**organization**” will include the following roles – **Applicant** and **Vendor**



State of Louisiana

Agency Grantor Management Structure Guidelines

LaGov Project

Business Partner roles that will be created for the Grantor transactions are defined as:

- **Applicant**
 - An Applicant is a third-party *organization* which applies for a grant through a specific Grantor Program office. For example, an Applicant could be a parish, university, school board, etc.
- **Contact Person**
 - A Contact Person is a *person* with whom a grantor program office has a business relationship. One or more Contact Persons could be assigned by an Applicant or Vendor as a person relevant to a specific Application, Grant, or Grantor Program. For example, a Contact Person could be a professor, a mayor, a school board employee, etc.
- **Employee**
 - An Employee is a member of a grantor program office who is involved in the interactions between the state and an Applicant or Vendor. This “employee” will have specific involvement in establishing, approving/rejecting, etc. with a grant. An example would be a manager or supervisor at the State agency level, i.e., The Louisiana Department of Education.
- **Vendor**
 - A Vendor is an organization which receives the grant award monies through claims processing. For example, a Vendor could be a parish, university, school board, etc.

For questions regarding this document, please contact:

The LaGov Project Support Group
LaGOV-ERP-Support@la.gov

Date for Completion

The LaGov project team is requesting that the spreadsheets be completed and returned by 07/10/2009:

Please return the completed spreadsheet to:

The LaGov Project Support Group
LaGOV-ERP-Support@la.gov