MEETING QUESTIONS

EVERYTHING WE NEED TO GET IT RIGHT

Grant document system for Recovering Oklahomans After Disaster

THE SIX QUESTIONS

01 How many cases do you process a year, and how many are open at once?

YOU TOLD US About 60–70 families helped a year, plus more processed that prove not eligible.

02 How many hours does one case take today, from referral to submitted package?

YOU TOLD US About 20 hours from intake to final submission.

03 How many people touch a case, staff and outside signers combined?

YOU TOLD US 2–3 people touch each case.

04 Is there a deadline or funding window driving this?

YOU TOLD US Yes. Grants have end dates you have to spend the money by.

05 Is this for one grant program, or several with different rules?

YOU TOLD US Two grants, with a small variation in rules.

06 Would you like the whole system built at once, or to start with one phase?

YOU TOLD US The full process has to be done for each family, so the whole system.

QUESTIONS FOR TODAY

07 How many cases are open at the same time, and are there busy seasons?

08 What are the spend-by dates for each grant, and is there a date you'd like the system running by?

09 Is the AHP grant through FHLBank Topeka? What is the second grant, and how do its rules differ?

10 What is the FCC, and what does "fill in locations" mean on the CCBHC documents?

11 When families text in photos, where do they land today: a staff phone, a shared number or email?

12 **Who signs ROAD's documents, and do your funders accept electronic signatures?**

13 **Which step takes the most time today, and where do cases get stuck?**

14 **Do you have a budget or limit for this project, and can it come from grant admin funds?**

15 **Which AI account would you like to use, and who manages it today?**

AS WE START THE BUILD

Working details we'll go through together in Week 1. Nothing to decide today.

01 **Walk through one past case from start to finish on a screen share**

02 Blank AHP workbooks, CCBHC and other Word templates, the FCC and the third-party inspection form

03 The most common reasons a package is sent back

04 Who signs at each step: homeowner, contractor, inspector and ROAD

05 Which income limits each grant uses, and for which year

06 Microsoft 365 and SharePoint admin contact, folder structure and file naming

07 Record-keeping and retention rules from your funders

08 The format of your accountant's proof of payment

09 Your e-signature tool, or setting one up

10 Whether cases need to carry their DIRRT case number

11 Whose accounts the AI and hosting run on, and who is billed

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