

2026 LORI Grants Management

Overview

LORI Grants are awarded to Library of Rhode Island (LORI) libraries, library consortia, or library serving organizations to execute forward-looking projects that support the advancement of library services in Rhode Island. Projects awarded address priorities of the Office of Library & Information Services Five-Year Plan, including expanding access to library materials and services, expanding learning opportunities or promoting literacy, expanding or advancing the use of library services or the role of the library in the community, or creating more inclusive or accessible library services to all members of the community.

All grant management will be done in the State of Rhode Island Euna Grant Management Portal. Additional user guides and help resources for managing your grant in Euna are available at the [State of RI Resources for Applicants and Subrecipients](#).

Accepting Your Award

- OLIS will issue a Grant Agreement and Federal Assurances package to be signed via DocuSign.
- OLIS will return your executed agreement via DocuSign; award activities may begin at this point.
- After the execution of the agreement, OLIS will issue the award for grant management in Euna to the library director/authorized representative.
- The subrecipient will review the award in Euna.
 - If no changes are needed, the award is sent to OLIS for final approval.
 - If changes are needed at this stage, the grantee will select “Return to Grantor” for an additional review and start the process over again.
- Once the award is accepted in Euna, the library may begin requesting funds as needed.
- All grant management will be conducted through the Award Dashboard in the Euna GMS.

General Grant Management

- In the Euna portal, the LORI Grant appears in the applicant’s list of grants under “My Awards.”
- Click on the grant name to see your Award Dashboard, which includes all assigned grant management activities and their due dates listed under Pending Tasks. Assigned activities may include:

- Interim financial report
- Interim activity report
- Financial Report
- Final Report
- Final financial closeout report
- You may generate new reports from the menu at the top of your Award Dashboard as necessary, including financial reports and amendment requests, select assigned reports under “Pending Tasks”, or find/edit existing reports under “Award Activities.”
- If you click on your grant and do not have access to the Award Dashboard, you likely have not completed the award acceptance process and still need to accept your award.
- The library director/primary applicant may designate additional library staff to the grant team using the “**Manage Grant Team**” button from the Award Dashboard.

Managing Grant Funds

LORI Project and Mini Grants are offered by the Office of Library & Information Services as subgrants funded through its federal Institute of Museum and Library Services grant under the [Grants to States Program](#) supported by the Library Services and Technology Act (LSTA). As such these funds are subject to the rules and regulations for federal funding outlined in the Code of Federal Regulations ([2 CFR Part 200](#)).

Best Practices for Managing Grant Funds

Adhering to the following best practices will ensure that the grant process runs smoothly for you, that your library maximizes your award, and that you will not jeopardize the library's eligibility for future grant awards.

- **Follow your approved budget.** If you want or need to make changes to what you submitted, contact OLIS before doing that. If your changes are not approved in advance, you may risk not receiving your funds.
- **Keep receipts clean.** Isolate grant purchases and payments so that receipts and invoices contain only items purchased for this grant program.
- **Save all documentation.** Ideally, save all your documentation as you go to one location so it can be easily provided to OLIS when necessary, and use file names that indicate the date and entity/company paid.
- **Get the documentation right.** Ensure that back-up documentation includes:
 - an itemized list for each purchase/service
 - the total cost of each purchase/service

- proof that the supplies/services were paid for and received
- **Spend all your money!** If something comes in under budget or the math just doesn't add up, contact OLIS for ideas on how you can spend the entirety of your awarded funds.
- **Maintain your records.** Federal regulations **require** you to keep your financial records for three years following the final closeout of your award.

Requesting Funds (aka Financial Reports)

You may request funds throughout your project window by submitting a Financial Report Request in Euna. Financial Reports serve two functions:

1. To **report** on how you spent the funds, including a budget category breakdown, a narrative, and space to upload back-up documentation for your spending; and
2. To **request** funds.

You may submit Financial Reports up to once per month throughout the grant window for either reimbursement for expenses already incurred or in advance of expenses to be made within the following 30 days. Contact OLIS if you require a combination of reimbursement and advance payments.

Reimbursement

If you choose to request funds for reimbursement, you must file one complete Financial Report, which includes the budget category breakdown, request for funds, back-up documentation and a narrative.

Advance Requests

If you choose to request funds in advance, you must file two Financial Reports. In the first you will request the funds and fill in a narrative explaining the anticipated spending you will complete in the next 30 days. The second will be filed after the spending is complete, providing the remaining financial report on that spending without requesting any funds. It will include the budget category breakdown, back-up documentation, and a narrative confirming the spending stated in the previous report.

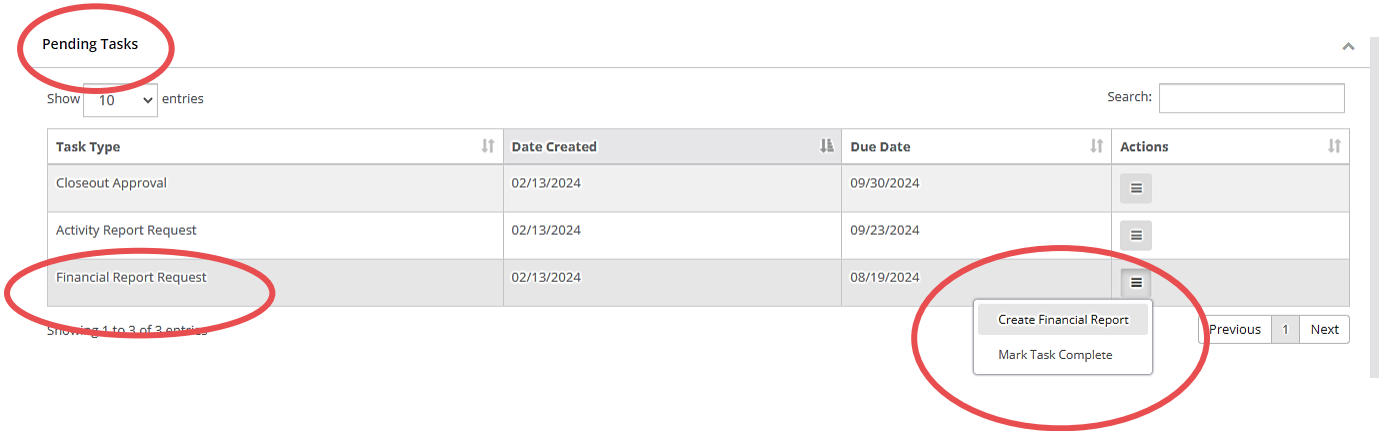
Navigating Finances in Euna

Let's take a tour of a financial report and its components! Navigate to your Award Dashboard to follow along.

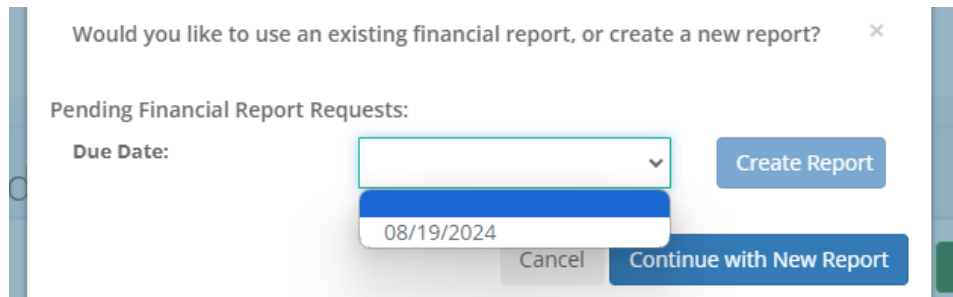
Opening the Financial Report

When you are ready to create and submit a Financial Report, there are several ways to go about this within the Euna system.

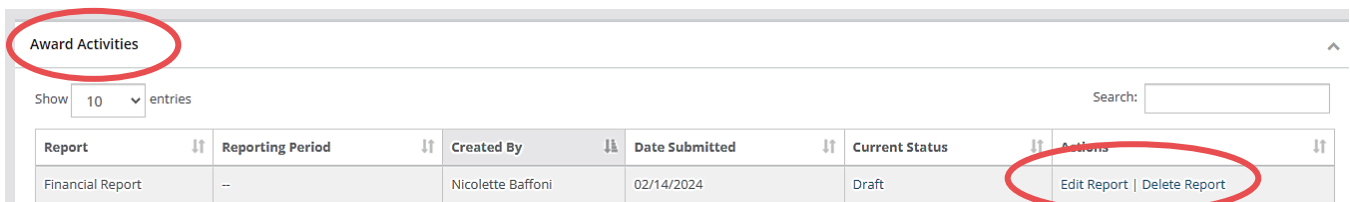
The recommended option is to scroll down to your **“Pending Tasks”** and create a financial report by clicking the hamburger menu to the right of your assigned Financial Report task. This will help to ensure you are not creating multiple financial reports, which can cause issues when trying to submit.



You may also select **“Submit Financial Report”** from the top of your Award Dashboard to create a report. Use the dropdown to select the OLIS-assigned due date if applicable or select **“Continue with New Report”** to start a fresh report.



If you or another grant team member has already started a financial report, scroll down to **“Award Activities”** and click **“Edit Report”** to edit or add to that report. You can also delete a financial report draft from here, if you would like to start from scratch.



Avoid creating multiple reports by checking the **“Award Activities”** and editing a draft report if one exists. Creating multiple reports may result in duplication of work and can lead to complications when you are ready to submit!

Parts of a Financial Report

Award Financial Overview

This is a summary of past financial requests, including funds that have been disbursed, amount previously reported, and the amount of your award remaining. These fields are populated by the system - you cannot and do not need to enter anything here, though you may wish to review this section for accuracy.

Award Financial Overview				
This overview will update in real time as you complete your financial request. The data here reflects all submitted spending reports, even those still in the approval process.				
Payments Received To Date	Advance	Reimbursement	Total Disbursed	Pending Disbursement
	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
	Spend	Match	Spend + Match	
Award Total Spend to Date	\$ 900.00	\$ 0.00	\$ 900.00	
	100.00 %	0.00 %		
Award Remaining to Date	\$ 0.00	\$ 0.00	\$ 0.00	

Financial Report Details

This is where you will report your actual spending by budget category when you are doing a reimbursement request or filing a second, follow-up report for an advance request. The only fields you can write in are the Spend and Match columns for categories in your approved budget.

Set the **“Reporting Period”** as the start date of your award through the date when you are submitting the report.

Financial Report Details Draft							
Reporting Period: *							
Category	Spend	Match	Award Approved	Match Approved	Award Remaining	Match Remaining	Total Remaining
1. PERSONNEL	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
2. FRINGE BENEFITS	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
3. TRAVEL	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
4. EQUIPMENT	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
6. SERVICES	\$ 300.00	\$ 0.00	\$ 300.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

When filling in the financial details budget chart, you cannot exceed the amount you were approved for; it will trigger an error if you do, and you will not be allowed to submit your report. If you need to shift your spending between budget categories, contact OLIS about filing an

amendment. If you would like to report overspending in a category but not shift anything to a new category, you can enter the overage in the Match column. You cannot enter anything into any of the grayed-out fields, nor do you need to.

Category	Spend	Match	Award Approved
1. PERSONNEL	\$ 0.00	\$ 0.00	\$ 0.00
2. FRINGE BENEFITS	\$ 0.00	\$ 0.00	\$ 0.00
3. TRAVEL	\$ 0.00	\$ 0.00	\$ 0.00
4. EQUIPMENT	\$ 0.00	\$ 0.00	\$ 0.00
5. SUPPLIES	\$ 300.00	\$ 0.00	\$ 300.00
6. SERVICES	\$ 600.00	\$ 0.00	\$ 600.00

If you are requesting funds in advance, enter the Reporting Period but leave the budget details chart empty.

Request Reimbursement

To request funds for reimbursement, you must check the Reimbursement Request Box. The amount you entered in the report details will be automatically filled in here based on the information you entered in the financial details budget chart.

To request funds in advance, you will still check this box, but you will need to manually enter the amount you are requesting, as the chart above will be blank. When you file a second Financial Report to share the details of your spending after it has been completed, you will leave the Reimbursement Request box blank.

Reimbursement Request*

\$	900.00
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Financial Report Narrative

A financial narrative is required for any Financial Report you file, including for reimbursement, advance funds, an advance funds follow-up report, and the final financial closeout report. You do not need to provide an itemized list of purchases here but should provide enough detail for reviewers to understand **what you spent your money on** and **how it was used**.

For an advance request, your first report requests the funds and states what you intend to spend your money on in the next thirty days and how it will be used for your project; your second report will confirm what you spent your money on and how it was used.

Financial Report Narrative *



Please develop your narrative below including key metrics, spending details, and other pertinent details.



The library paid the Health Care consultant \$1000 for two programs on mental health and wellness. Supplies for these programs and circulating kits were purchased (\$2,356), including yoga mats, blocks and straps, blood pressure cuffs, cognitive puzzles, memory aids, and books on various health and wellness topics.

You do not need to include detailed information about outputs or outcomes in this report or much detail about the activities. We do not need to know attendance or circulation numbers, how these purchases contributed to the achievement of the program goals or any anecdotal or observational data. That information will be shared in the Final Report; information provided here is simply to contextualize the purchases made.

Financial Report Files

“Financial Report Files” is where you will include your back-up documentation: paid invoices, receipts, etc. – to show proof of all the reported expenditures.

- Invoices/receipts must include:
 - an itemized list of purchases/services
 - the total cost of purchases/services
 - proof that the supplies were paid for and received or proof that the services were paid for and provided to the library.
- This may be one item (i.e., a paid invoice marked received) or a combination of documents that meet the criteria (i.e., an unpaid invoice, packing slip and cancelled check).
- Please name files with the date of purchase and the entity paid (i.e. 05-15-2024-Amazon); this makes the review process significantly faster for OLIS staff.

Be sure to redact any account numbers on invoices or cancelled checks!

Financial Report Files

Please upload any files necessary For your financial report. This may include financial transactions, receipts, program income, etc...

[Upload File](#)

Show 10 entries

Search:

File Name	File Size	Actions
No files are available for download		

Submit Your Report

When you have reviewed your financial report for accuracy and completeness, click the red **“Submit Report”** button. If you are completing your report in multiple sittings or if multiple grant team members are contributing to the report, click **“Save & Close”** and then access your draft report under the **“Award Activities”** list when you are ready to revise.

[Save & Close](#)

[Submit Report](#)

[Cancel](#)

Award Activities

Show 10 entries

Search:

Report	Reporting Period	Created By	Date Submitted	Current Status	Actions
Financial Report	--	Nicolette Baffoni	02/14/2024	Draft	Edit Report Delete Report

Showing 1 to 1 of 1 entries

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Report Approval Process and Receiving Funds

The OLIS grants team will review your submitted financial report for:

- **Allowability** (Did your purchases align with your approved budget?)
- **Accuracy** (Do the numbers in the report details match the narrative and the back-up?)
- **Completeness** (Are all requested funds accounted for? Does the back-up documentation show an itemized list of purchases/services, the total cost and proof of payment?).

If the OLIS review finds any errors or missing information, the report will be returned to you through Euna with a note explaining what changes are necessary for your report to be accepted.

If your report is not accepted, be sure to edit the report that was returned to you by scrolling to the **“Award Activities”** list on your dashboard and select **“Edit Report.”** Do NOT start a new report, as this will create extra open reports and may cause issues when you try to resubmit.

After the report is approved, it will be sent to the state's finance system, and the library or library's fiscal agent will receive payment within 30 days from the date of submission.

Final Financial Report (Closeout)

To officially close out your grant, you must submit your **Final Financial Report (Closeout)** by the assigned date in Euna.

- This report ends your grant in Euna, so you will not submit this report until financial report(s) and final report have been accepted and all grant funds have been disbursed.
- This report is identical to a regular financial report, but you do not need to re-enter any information that was previously shared in your financial report(s).
- There are 2 required fields: Report Period (enter the start date on your award – the day you are submitting the report) and the narrative (enter “see previous financial report”).

Congratulations! Once the Final Financial Report is approved, your work on this grant is complete!

Amendments

Grantees may request changes to award activities and budget details throughout the project window. As with all grant management, amendments will be requested through Euna. It is important to reach out to OLIS before you make changes and/or request an amendment in case your proposed changes are not allowable under the scope of your award.

Changes that do *not* require an amendment include:

- Small shifts within a budget category, i.e., getting a different brand or style of a requested supply, buying additional units of a requested item due to a decrease in price of that or other items, buying fewer units of a requested item due to a rise in price of that or other items, replacing one presenter on a topic with a different presenter on the same topic.

Changes that require an amendment include:

- Shifting funds between budget categories, even small amounts;
- Making significant changes to project activities or spending.

Amendments will be filed in Euna and reviewed by the OLIS Grant Team; approval and notification will also be conducted through Euna. Contact OLIS if you believe you need an amendment for more detailed instructions.

Other Reports

You will have additional reports to file through Euna as part of your grant management.

- **Interim Financial and Activity Reports** will ask for a brief narrative of spending/activities to date to ensure project progress and track that spending is on track to be completed within the project window.
- **Final Report** will ask for more detailed descriptions of project activities, output measures, outcomes assessment and other information as needed for the OLIS federal report.
- **Final Financial Report (Closeout)** will provide a final opportunity to report any pending financial details and closes out the grant in Euna; this report cannot be filed until all other outstanding reports have been approved.

Timeline

All reports, financial and otherwise, must be submitted through the State of Rhode Island's Euna Grants Management Portal. Grantees may draw down funds up to once per month through Euna during the project window for expenditures made or for expenditures to be made within thirty days.

- **June 5** – Final day to request funds to be processed in state FY2026.
- **June 30** – Interim Financial Report and Activity Reports due, to ensure your spending and activities are underway and can be completed within the project window.
- **July 1 – August 31** – Site visit occurs, as scheduled with OLIS grant liaison.
- **August 17**– Final day to submit a Financial Report to draw down funds.
- **August 31** – Project conclusion.
- **October 5** – Grant Report (Miscellaneous Task assigned) due in Euna.
- **October 30** – Final Financial Report (Closeout) due in Euna. This report collects any outstanding financial information from the subrecipient, permanently closes the award in Euna, and cannot be completed until all other financial and activity reports are submitted by the subrecipient and accepted by OLIS.

Contact

For questions about grant management and program-specific issues, contact Nicolette Baffoni (nicolette.baffoni@olis.ri.gov).

For technical issues with Euna, use the State of RI [Grants Management Office User Support Portal](#); do not contact Euna directly.