GRANTS OFFICE
empowering communities

Planning Ahead: You Got the Grant! Now what?

A Guide to Post-Award Compliance



Today's Presenters



Elizabeth Evans

Grants Office
Manager of Research
and Consultation



Sandy Trowbridge

Grants Office
Grants Development Associate

TODAY'S AGENDA

01 | Understanding the Post-Award Process

02 | Startup Considerations

03 | Implementation Considerations

04 | Closeout Considerations

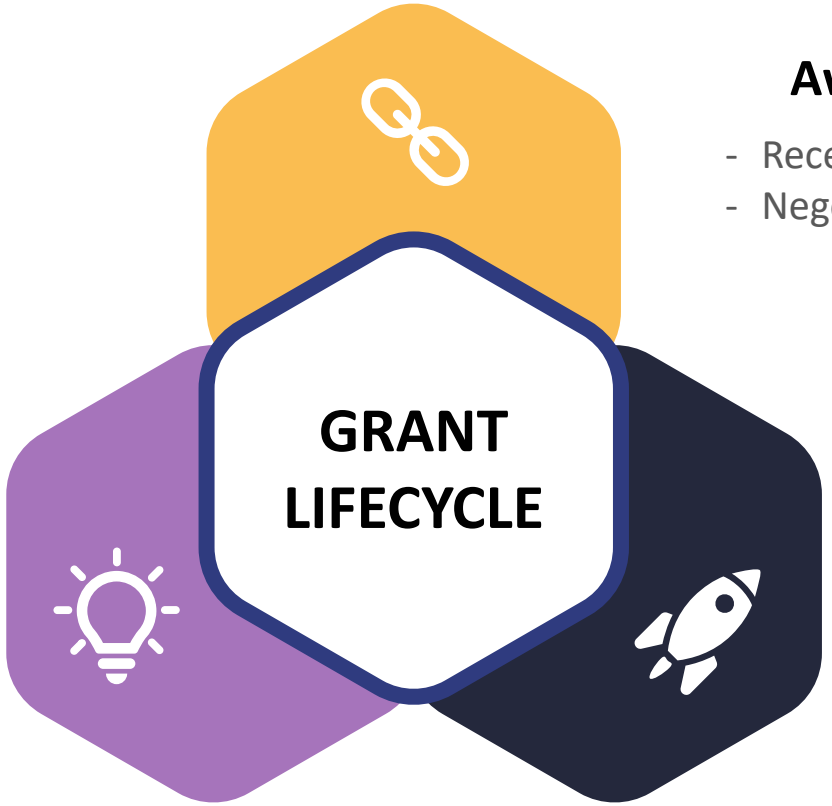
05 | Q & A

06 | Grants Office Services and How to Engage



Understanding the Post-Award Process

The Grant Life Cycle



1

Pre-Award

- Define needs statement
- Build out your project plan (including SMART goals, etc.)
- Research grant opportunities
- Foster relationships
- Draft / submit application

2

Award Negotiation

- Receive notice of award
- Negotiate funding agreement

3

Post-Award

- Implement your project
- Comply with all monitoring and reporting requirements
- Respond to audits (if requested)
- Closeout your project

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The Grant Lifecycle Timeline

Grant Program Announced

Prepare application in 4 -8 weeks

Applications Due to Funder

Wait 4 - 8 months to hear back

Award Winners Announced

Coordinate with funder for 4 - 8 weeks

Awardees Implement Projects!

Anywhere from a few months - 5 years

Final Project Closeout

Submission of any final reporting requirements

Pre-Award

Award Negotiation

Post-Award

Post-Award Overview

1 Implement Your Project

Develop a comprehensive project plan and timeline (noting key deliverables, project team responsibilities, deadlines, and resources needed to achieve grant goals). Implement project activities.

2 Comply with all Monitoring & Reporting Requirements

Track programmatic and financial performance and adjust plans accordingly. Check grant agreement for when reports must be submitted and meet all deadlines.

3 Respond to Audit Requests

Keep reports and documentation organized and readily available as they *may* be subject to an audit by the funder.

4 Closeout Your Project

Ensure all funds have been spent, goals and objectives have been met, and a final evaluation has been completed (if required by the funder). Thank the funder for their support!

Key Post-Award Participants

Grantor	Grant Award Recipient	Project Beneficiaries	Project Partners
Program Officer	**Project Implementation Team** (staff responsible for Project Management, Procurement, Reporting, Etc.)	**Anyone the Project Benefits**	**Collaborators, Sub-Grantees, Etc.**

Startup Considerations



DAY 1

- ❑ **Review Grant Materials** - NOFO, Application, Authorizing Legislation, and Grant Award Agreement
- ❑ **Schedule Proposal-to-Implementation Handover Meeting –** Pass Knowledge Forward
- ❑ **Schedule Startup Team Meeting –** Include all Project Team Members, Confirm Roles, Assign Startup Tasks

WEEK 1

- ❑ **Create/Finalize a Detailed Project Workplan** – Note Activities, Roles, Deadlines, Deliverables, and Goals
- ❑ **Create a Reporting Calendar –** Include Programmatic and Financial Reports, Internal Deadlines, External Deadlines, and Filing Location
- ❑ **Review all External & Internal Regs, Policies and Procedures –** Procurement, Budget, Hiring, Etc.





MONTH 1

- ❑ **Develop/Confirm Templates for all Project Reporting –** Ensure Team Access
- ❑ **Prioritize Document Management –** Store all Documentation in One Centrally Accessible Location
- ❑ **Schedule / Facilitate Regular Team Check-Ins –** Confirm Progress Against Project Workplan and Budget

Implementation Considerations

Ongoing Implementation

- **Implement Project Activities -** According to Project Workplan / In Alignment with the Grant Agreement
- **Track / Monitor / Evaluate Programmatic & Financial Performance –** Document Everything As You Go
- **Prepare and Submit All Reports (Programmatic and Financial) –** Meet all Deadlines Detailed in the Grant Agreement





Ad-Hoc Considerations

- ❑ Change Management
- ❑ Audit Preparation
- ❑ Funder Relationship Management

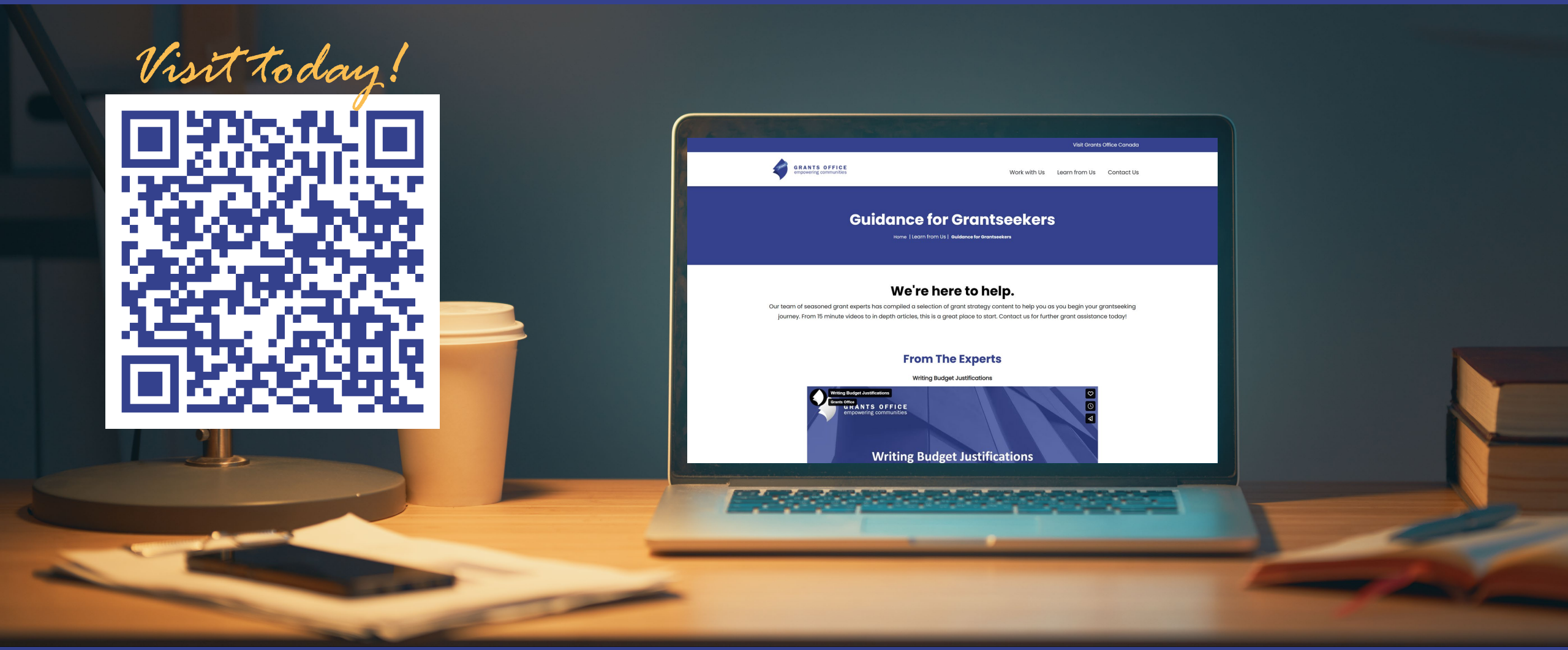
Closeout Considerations



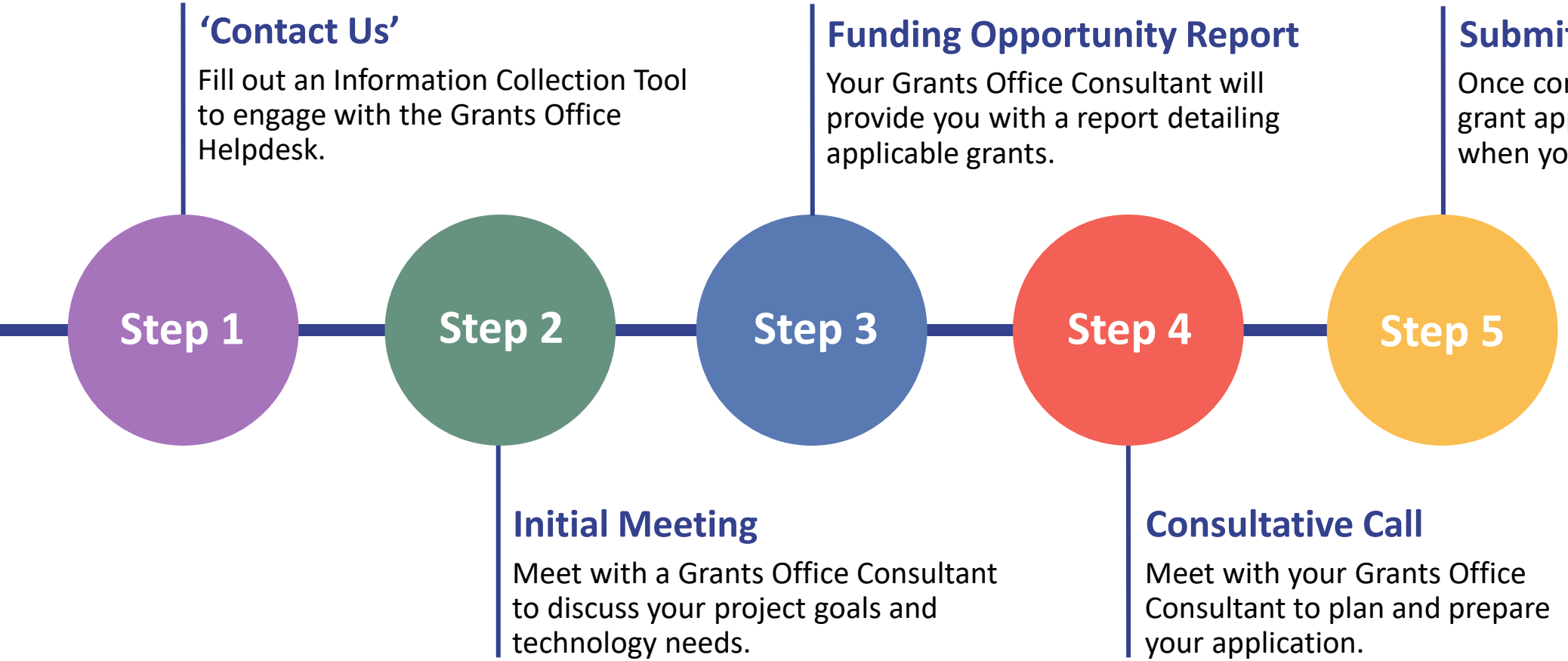
Key Closeout Considerations

- ❑ Start Planning for Closeout Early
- ❑ Review Closeout Terms and Conditions in Your Grant Award Agreement
- ❑ Notify Any Sub-Recipients / Vendors of Closeout Timeline and Request Final Invoices and Reporting
- ❑ Ensure Final Costs Will Be Processed Prior to End of Period of Performance
- ❑ Capture Any Lessons Learned (Both Technical and Programmatic)
- ❑ Submit Final Reports (Programmatic and Financial)
- ❑ Thank the Funder!

FREE RESOURCES: Guidance for Grantseekers



Engage with Grants Office



Questions?

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www.grantsoffice.com

education@grantsoffice.com

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