From Proposal to Practice: How Your Grant Application Shapes Post-Award Management

Webinar Transcript • November 19, 2026

Presented by Ashley Schultz and Joseph Phelan, Grants Office, LLC

Welcome and Introductions

Ashley Schultz:

Hello everyone, and welcome to our event. My name is Ashley Schultz. I am the Manager of Community Engagement here at Grants Office, and today we're going to be discussing post-award management. Now, we're not going to be discussing it in a way that we've really ever done here before at Grants Office. This is not an event that goes into any detail about how to sign an award agreement, or how to fill out a progress report, or how to submit receipts, or anything of that matter. Really, today, instead, what we're talking about is how to set yourself up for success to sign those forms or complete that paperwork while you're in the process of applying. So what sort of best practices can you deploy in the writing phase, the part where you're actually asking for money, that's going to make the part where you win the money and you spend the money that much easier for your organization?

We very much hope that you enjoy today's event, and I encourage those of you in the audience who are representing a grantseeking organization, whether you are a seasoned vet or really just getting your feet underneath you, to consider who else amongst your peers may benefit from today's session and pass it along to them. A recording of today's session, along with the slide deck and the transcript, are going to be available at the Grants Office website starting tomorrow.

I'm joined today by my excellent coworker Joe Phelan, who is a Grants Development Consultant for our state and local government team here at Grants Office. I have worked with Joe for a very long time, and I can say that he is always bringing creative ideas and really insightful feedback to the table for all the grantseekers that we work with. Joe is normally our in-house expert on all things transportation, broadband, and utilities, but we have him all to ourselves here today to talk about grantseeking best practices in general. In short, Joe has a wealth of experience and expertise in the grantseeking landscape, and I think you guys are going to learn a lot from him today.

Here's a quick run-through of our agenda over the next 30 to 40 minutes. Once I pass things over to Joe, he's going to walk us through, first, how individual grant requirements and application components impact your post-award activities. So where those pieces show up in contracts and also in your compliance documents on the other side of the application. Then Joe's going to share ideas on how you

can make all of that easier for your organization by applying to your next grant with those award requirements in mind.

We'll also include a quick overview of some of the additional services the Grants Office team can provide for your grantseeking efforts, whether this is someone that you need to come in and actually review a draft of your proposal, or you maybe want someone to put pen to paper on your behalf and actually write the narrative. We're going to have time for Q&A at the very end, so please drop all questions that you have in the box in the bottom right-hand corner of your screen, and we'll address them all at the end. So with that, I'm going to pass things over to the very capable hands of Joe to get us started. Joe, take it away.

Understand How Grant Requirements Impact Your Organization

A Hypothetical: After the Award Arrives

Joseph Phelan:

Thanks so much, Ashley, and thank you, everyone, for joining here today, whether it's live or you're going to watch the recording later. So as we begin, you may have been in a meeting like this before. Your organization has successfully achieved your grant. In this scenario, this very hypothetical scenario, you're a midsized regional transportation agency with 140 buses. You have a smaller grants team of maybe one or two people. There's a board that meets monthly to discuss various things. You receive a grant award; this is a very hypothetical scenario. It is a sizable grant, $10 million or so. There's going to be a local match that's required of 20%. So you're getting some new buses, maybe some charging infrastructure and real-time passenger information systems, so there are some vendors involved, maybe a fleet management software. It's a three-year grant program, and you're very excited to get started.

You get the award agreement, you sign it, and you're very excited to get to see it going. You have your kickoff meeting, and you realize a few things. And maybe this doesn't happen all at once, maybe it's over the course of the project, but a few things happen that provide some doubt for your organization. The first thing you realize is, you were really banking on the capital program from the state to be the match. You were going to use that as the match, and then you realize that there was a reduction this year with the capital program. So you have to set up a meeting with the board to adopt a commitment resolution at some point, so it's going to adjust the start of the project. So that could be an issue that takes place.

There could be an issue with the timeline. Maybe the person who applied for the grant left for a new job, there is no handoff or project manual, and that's going to impact the reporting of the grant requirements. And then maybe there's a scenario where someone didn't take control of the data. You're not really sure who the vendor is going to be, and you're not really sure who's going to be responsible

for owning things. And then another example could be in the form of partnerships. There could be a procurement conflict, so a partner or vendor who helped shape the scope was then selected without a competitive process, which might raise a procurement integrity issue. So that could also happen.

So there's a handful of things that could go wrong once you start the award, as well as throughout the post-award management of that specific grant. As you have those conversations and those issues come up, it's important to remember, as you're beginning any type of grant application, that to apply for a grant means to comply with the grant agreement. So to apply means to comply.

To Apply Means to Comply: Three Questions and Four Places to Look

These are the three questions that I'm going to ask over the course of the next handful of slides: What will our application promise? Where will our promises appear in the award? And what do we need to do about it? Now, when it comes to a grant application, there are four areas that you can look for when it comes to post-award commitments. The first is the budget; then there's also the project timeline, the measurable outcomes, and then you have your partnerships. So the budget's going to be the personnel, the equipment, any type of construction, contractual obligations, as well as indirect costs. Whatever needs to be paid for with the grant will be included in your budget, as well as within the budget narrative.

The project timeline is going to be a variety of things. It's going to be the important phases that your project needs to accomplish, the various activities, the milestones, who's responsible for what, any deliverables that need to be promised. This is where the reporting comes into place as well. You have the period of performance: when the project's going to start, when it's going to end. And then you also have the measurable outcomes, which will be the resources that you are investing in this project and the specific activities that you hope to accomplish. This is where all that data comes into play: who's reporting what, how it's being reported, variable outcomes, the impact of the project. And this goes hand in hand with the deliverables, the reporting of the project.

And then lastly, you have the partnerships. You could be just your own organization, like that transit agency that's applying for a grant, and you successfully received the grant. However, it's rare that you're only on your own. It could be a co-applicant or a contractor or an in-kind partner. There could be a subrecipient involved, or several subrecipients; there could be an endorser. There are tons of specific areas that have a partnership requirement. There can be a fully committed partner; there could be someone that's just a letter of support. It will obviously depend on the grant itself that you're applying for. However, partnerships are going to be seen throughout the process of applying for a grant, so keep that in mind as we go through this presentation.

Your Budget

So first is the budget. These are the line items that I mentioned earlier: the personnel, the equipment, as well as other aspects of it. There's also going to be the justification piece of the budget, and that's going to be in the budget narrative. You're going to have to explain why you need a certain thing to accomplish the project. And this is also where cost share plays a factor. The cost share is going to be a promise for you to contribute your own or partner dollars, or any type of in-kind contribution, to the overall project, the overall success of the project. Basically, to have skin in the game; you will hear that phrase from time to time, about having skin in the game.

For the award agreement: once you accept the grant award, you're agreeing to whatever constraints that the funder may have removed from your initial application. It could be that maybe they accept more applications and the budget itself is a little lower; maybe there are going to be additional conditions to the award that you weren't necessarily prepared for. But that's all going to be in the grant award agreement, so that's where you say, "I accept these conditions." The approved spending limits will be how much you are able to spend, and the approved shopping list is going to be where you can spend it. So if there's something that isn't on the approved shopping list, you're most likely going to need approval first. And the agreement is going to be the thing that's binding.

And then you need to specifically spend the award as approved. So within the period of performance; you won't be able to spend before or after that period of performance. So it's in those specific requirements that you need to secure approval: know what changes need written prior approval before you act, which might mean moving money between categories, or even buying equipment or changing key personnel. Ask first, and then keep whatever response in writing. And then there's also that match aspect of things. I mentioned earlier the 20% local match for that transit agency. Make sure that if things fall through, if there needs to be one more board meeting to discuss how to find those funds that were misplaced or lost, or the promise wasn't necessarily fulfilled, this is where you will track that match or any other changes that take place with regard to the match.

Your Project Timeline

The next area is the project timeline, which has to do with your schedule. In your application itself, you're going to have a proposed schedule, all the different key milestones that I mentioned. This is where the period of performance plays a role. Most grants outline exactly when the program is supposed to start and when it's supposed to end. Now, these will be estimates. If the grant itself takes a little bit of time to be approved, you might meet with the program manager and have the award agreement in place, but it might take some extra time in order for you to start the project. So it's going to typically arrive later than you initially had, but obviously that's when the work begins, so you might need to adjust the dates a little bit, and that's what happens in your award agreement.

That's going to be where the reporting schedule is explained; it's going to be where the closeout date appears, and everything else that's going to be required for a successful application. It's important to have all that on one calendar and have everyone involved. So that's going to be in your award agreement. And then some things you want to have in store: build a buffer for possible extensions. Bake that into your actual project timeline. Extensions won't always be automatic. There might be some requirements, and the Notice of Funding Opportunity, or NOFO, is going to be where you look and find those types of things, or asking the agency itself.

But you want those buffers for possible extensions, for issues — especially if it's a project that requires ordering different parts, and you never know with supply chain issues and things like that. So buffer that in, as well as have a contingency in place. For example, there could be someone that's heavily involved in the project and they get a new job, or there's a retirement. Make sure that there's a contingency plan across the board for the organization when it comes to what to do in those scenarios. And maybe you're in a situation where you're the only person who handles this type of stuff, and you're in a pinch, and you yourself are the one who might be taking another job. Just for your own sake, have some sort of contingency plan in place, if that were to be the case and you were to leave a job while a grant is still active.

Your Measurable Outcomes

So the next phase is the measurable outcomes, which are going to be all the different activities and metrics, outcomes, and impacts of the project. This is where you're going to pick specific targets, and numbers are very heavily involved in this aspect of the grant application. There should be a baseline; there should be a data source that explains why this is realistic or how this is possible. This could be where, such as in a U.S. Department of Transportation, or USDOT, grant opportunity, there are these benefit-cost analyses. There are also scenarios where environmental studies or similar things are expected within the application. Metrics are going to be a huge part of the application, and you want to be as precise as possible.

Once you get the award agreement, this is going to be where a reporting plan is established, as well as a data collection plan. And this could be a thing where how you report things, how often, in what format, and who receives it specifically could be different depending on what part of the project you're working on. And some funders are going to add required metrics that weren't necessarily in your application either. Then you want to make sure that what you promised can be measured and reported accurately.

I mentioned earlier the transit agency and how no one owned the data collection. So being able to have someone who is responsible for reporting the requirements — it could be the organization itself; it could be the vendor that has the technology to accurately report exactly what is being measured, why it's being measured, and how it's being measured. Someone should own the data collection, decide which

tools or systems are going to be required to capture each metric, and confirm they're in place before the first activity begins. That's all stuff that you can do, preparation-wise, before you start the grant award.

Your Partners

Then lastly, we have partners. Partners are going to be any type of letters of commitment or support, any memorandums of understanding, or MOUs, key staff personnel. We see that a lot with applications, and that shows your application is credible; it's reputable. It's not just one person or one organization that's applying for it. This is going to impact the specific companies or organizations that exist within the application, but also the community at large, or the region or the state, depending on what type of grant program you're applying for.

Reviewers are looking at who is doing the work, and it matters who is doing the work. If you put someone down just because it makes you look good, and then that person or that organization ends up not doing the work, you're not being truthful to the reviewer. They think someone else is doing it that has different qualifications than someone else. I think it's important to explain exactly who's involved, and making sure that they're involved. Obviously things happen, and jobs might change and things like that, but if you're true to what you say with your partners, you should be true throughout the process.

So in the award agreement, that's where roles and subaward agreements and vendors are established, and they're going to have different relationships and different roles. This is also where subrecipients might be a factor. They're going to be the ones who help carry out the project, and they're going to be responsible for monitoring their compliance. But then there's also the vendor, which is going to be the one who sells goods and services, and they're going to have your own internal procurement rules that need to be established and need to be focused on, making sure that they follow those rules.

There's also having scheduled partner check-ins. This is a good thing to practice from the start: having those recurring meetings, how often you would like to from the start, and how that would solve a lot of the issues before they become a bigger issue. You also want to tie partner deliverables to dates and data. Each partner should know what they owe, what data they should send for reporting. That's going to connect back to the previous two slides when it comes to the timeline of things as well as the outcomes. And this is where it's important to have invoices and records and any type of documentation, and make sure that the schedule matches from all the different reporting dates that you have.

The thing to always keep in mind when it comes to any type of advice is, the Notice of Funding Opportunity is going to tell a lot of the things that are going to be absolutely required, and the same goes with the grant agreement. So those are always going to be those binding documents that you want to reference throughout the process. And the program managers and individuals like that, they're going to be the best people to speak to when it comes to specific case-by-case examples. But generally

speaking, before you submit any application, you want to ask yourself: What will we be required to do? Who must approve it? What does it cost, and how long will it take? So having a checklist, an owner for every single requirement, goes a long way when it comes to managing the grant award.

Shape Your Next Application to Fit the Award Agreement

So a lot of the conversation so far has been about the different aspects of a grant application. You might be an organization that is interested in applying for a grant soon, and you want to know, how can I use this advice, the advice I shared in the previous slides, to shape my next application to fit the award agreement? Because that is the goal: whatever the award agreement is, whatever you're buying into, you want to make your application as smooth as possible, to make that transition into the post-award grant management of that grant as easy as possible.

Write with the Award in Mind: Your Budget

So we'll talk about the budget first. When it comes to your budget, your application should include the most realistic possible outcomes: current salary, actual unit costs. With anything that is optimistic at a very unrealistic measure, there could be some issues that it causes down the line. So you want to be as realistic as possible. Only pledge if it can be documented; if it can be documented after the award, then you can pledge it. So even that hypothetical I shared earlier, about the local match and the capital state funds that didn't go as high — even if you were so sure of it, every year for the last five years it's been the same level, and you're very confident that this is going to happen, things could change and it might fall through.

So have it in writing, and that could be in writing from the state, that they'll have whatever the cost share is. Having that documentation is going to matter in your actual application when you submit the application. It's going to help you be more compliant, and once you accept the award, it'll allow for you to be more compliant. And then only commit staff effort that can be backed up. So make sure that you're listing the time someone spends on the project. If you list someone at 20% effort, you need time and effort records showing that 20%. So don't list a senior person at a percentage they won't work just to make the proposal stronger. Be as accurate as possible when it comes to the staff commitment.

So then in your award agreement, approved line items are going to require funder approval to change. What looked like a draft in the application is now a limit; moving money between categories is most likely going to need written approval. So always keep that in mind, to be as accurate as possible when it comes to your actual budget. Your accepted match becomes an obligation you have to track. It's something you're going to report on, and falling short might reduce your award, or it could lead to a finding. So if there is an issue with the match, that's going to delay your project.

What you write is what your auditors will test against. So any type of changes to key personnel are probably going to need notice or approval. And then before you submit, review a budget line and ask: Could I prove this in an audit? Could I live with it if the funder approves it exactly as written? Because you might see the award agreement differ from the application. But if it's just as it is, you have to agree to it, since it's your application and you're the one who submitted the actual application. So you should agree to the award agreement, or otherwise you probably won't be getting that award.

Write with the Award in Mind: Your Project Timeline

For the project timeline, there's a couple of things here. I mentioned the buffer; you definitely want to establish a buffer for approvals and delays. It could be permit reviews, could be hiring, it could be procurement in general. Those things are going to take longer than expected sometimes, so make sure that those have a built-in buffer, and, similar to the budget, be as realistic as possible, knowing that this might be your first time applying for a grant. There might not be as much help when it comes to actually applying for the grant. So definitely build those buffers into your schedule, for your cadence to be as realistic as possible.

You also want to set firm milestones that can be verified. There's a specific date that's going to be established. You don't want anything vague when it comes to milestones. You want specific numbers, specific actions, whether it's the contract being signed, or buses being purchased, or infrastructure being installed — specific numbers of infrastructure equipment being installed — or when the facility will open. All that needs to be as specific as possible. You can't be vague when it comes to milestones. And then you want to better understand the funder's rules. So this is where reading through the NOFO, reading past examples of projects that had issues when it comes to extensions and things like that with the specific agency — that's where you do a lot of the homework, knowing how long an extension can run.

For the grant agreement, the timeline is going to be set, so the reporting schedule and the end date, that's all going to be included in the grant award agreement. Those are the dates that you're going to report against, but based on what you applied for in the application, this is going to be fixated in the award agreement. So that's why it's important to keep those buffers in mind, as well as those firm milestone deadlines. Speaking of that, milestones are going to carry into the agreement. They become benchmarks for progress reports, so they also help decide if you're on track. If it's a three-year agreement and you're really struggling to accomplish what you sought after in year one, that's going to impact your organization as well as your progress with the post-award grant management of the program. So milestones are going to be very prevalent throughout the award process.

And then extensions are going to be limited, typically, and they're going to mostly require advance notice. So there must be more information involved as far as a reason goes, explaining why you need to

provide an extension for the grant. And always-sound advice is, if you know what's going to happen, but it's in the process and you're able to fix it and resolve it as soon as possible, it's always better to solve it ahead of time rather than wait for it to become a bigger issue. If you aren't positive it's going to be an issue, reach out directly and try to get that extension before, just in case you do need that buffer time for any type of reporting or things like that regarding the project.

And another thing to keep in mind, because of the nature of grants in general, with the timelines and things like that: look at it from a perspective of, well, what happens if there's a huge issue, or we can't hire this person, or there's a big supply chain issue when it comes to deliveries and things like that? It's always good to put in an extra six or ten weeks, or whatever the case may be, and, given that worst-case scenario, we can still accomplish the goals of this project. The end date is still realistic enough for us to accomplish this. And I think that's something that you can keep in mind, and outline the worst-case scenario for when you apply for the grant when it comes to your project timeline. Because if you're prepared for the worst, then if it goes smoothly, there's no issues there. And if it is the worst, then you are prepared for it.

Write with the Award in Mind: Your Measurable Outcomes

The next is measurable outcomes: definitely the numbers are attainable, and they also can be verified. It could be past performance; it could be a pilot for a similar project or organization that you're familiar with, or that you've researched and you know about. You can use that information as well, or comparable programs. And then you want to explain it. If you're unable to explain it, it's probably too high of a number. So verifiable means someone else could check it from records to confirm that it's an attainable number. When possible, name the data source, and then try to provide a baseline, because it's hard to show something can change without having a baseline. So you want to have a baseline established within your measurable outcomes.

And then only claim results your activities can produce. So if we're talking about a three-year grant program, you can't necessarily talk about the future past three years. You want to focus on that specific three-year time frame. Only claim what you can control and what you can influence over the course of the project. In the award agreement, the targets are going to be the basis for performance reporting. Your numbers are going to go into the performance plan, and every report compares to them. So that's important to keep in mind with those attainable numbers.

Then you have results that can affect payments or continued funding. There could be a situation where the awards are tied to milestones, so there could be an issue if you fall short — if you're totally off base with what you're targeting, and you're still reporting, you're still meeting the guidelines and deadlines and things like that. However, your application wasn't necessarily accurate, and you might have misjudged or misunderstood exactly what impact it would have, but it could impact your future

applications and things like that. So keep that in mind, because the data source and providing the baseline, it will go a long way. And obviously, if you're being honest in general about it and you still fall short, sometimes those things happen, but at least you're prepared for that scenario.

Your project also might have several funders, and each may require its own report and schedule, so ensuring that everything is aligned across the board — and your award agreement is going to be the essential document for that. And one thing to keep in mind is to ask, for each one that you do when it comes to your measurable outcomes: Where will this number come from? Who will be responsible for it? Who will pull it? That's what you should do before you submit the measurable outcome aspect of the grant application.

Write with the Award in Mind: Your Partners

And then lastly, we'll talk about partners. Partners are going to make the proposal stronger. Only those who have defined roles and confirmed roles should be included. So if someone's on the fence — maybe they're interested in being a partner, but they're not committed — do not include them. Only ones who are part of the approved plan. Make sure that each responsibility of the partner is stated: who's involved, exactly what they're going to do and with what resources, and include them in the timeline. Don't just say that they're going to support the project; be as specific as possible. And then letters to confirm that they are included with the submission will go a long way as well. If there is a match that's going to be from a partner, that's where you're going to include that. And that's going to carry a lot of weight, because the partner is the one that has skin in the game when it comes to the in-kind contribution.

And then those roles become part of the approved plan, the funder-approved application, with those specific partners that you mentioned doing those specific jobs that you included. So that's going to be a deliverable. That's what the expectation is to be delivered. And then if you have to swap out or add a partner, that will need approval, which might adjust and change the timeline of things. It also might not be approved altogether. So making sure that you have everything that you need, every part that you need, in your application, and you don't have to worry about adding or swapping — that's going to make it a less stressful process for you.

And then the last is going to be the funded partners that are going to require some sort of formal agreements. It could be a subawardee; it could be a contractor. There might be a formal agreement that's required, and that should be baked into the schedule. So keep that in mind as you're building out your project's schedule and your partners: there might be required formal agreements, so you're not just getting the grant award and signing it and then suddenly you can start the next day. You might have to wait a few weeks, or more than that, depending on how many partners and what their internal processes are like and those types of requirements.

Establish Good Habits

Before I pass it back to Ashley, I wanted to talk about establishing some good habits. I shared a lot of information today about budgets and project timelines and measurable outcomes and partnerships, and how they relate in the pre-award, during the award, and then the post-award management of it. But I can share four specific routines that are simple, and they work as long as you stay with it. If you start them right away, I think they go a long way when it comes to the best practices that we've seen and that we've learned about when it comes to post-award grant management.

Initially, there's the reporting calendar. Any due date on any report from the agreement should be in one shared calendar. It could be financial, it could be the progress of the grant, it could be just performance-related, the closeout information; anything that needs to be reported should be in some sort of calendar. And then also internal deadlines that are earlier than what is said in the reporting calendar. So whenever we apply for a grant or help an organization apply for a grant, it's always — let's say the deadline is Friday, November 20; internally, the deadline is the week before, Friday the 13th. So even if you don't plan on submitting by the 13th, if it's ready by the 13th, you should have no issues applying a week later, because the internal deadline was the 13th. One or two weeks earlier, which will allow for review and sign-off before you submit a report.

And then the next one will be to have someone take ownership of each report, for the data plan. So the data plan itself: if you're an organization that has only applied for a couple of grants and hasn't necessarily been successful, and you're just waiting for the right opportunity, being able to write down every single metric that your organization cares about when it comes to reporting — how you define it, where it comes from, who collects it, and how often — that should be written down internally. It also might change depending on the project that you're applying for, but having just an internal chart and data plan in place within your organization will allow you to track the outcomes that you promised easier.

This is the only way you can measure what you hope to accomplish with the grant. And then you also make sure that you mention partners when it comes to your data plan as well: what they send to you, how they send it to you, the specific dates, and how it coincides with the reporting calendar.

Then there's also the decision log. You want to keep a record of changes and approvals; it could be personnel changes, it could be partner swaps. We talked about how sometimes they're unlikely, but sometimes you are able to get those changes, so making sure that everything is approved — everything that has been approved should be in writing. Any email should be saved, with information about agreeing to or approving this, which will allow for smooth sailing throughout the post-award grant management process. It's a lot easier to backtrack and find an email that you already have saved in the

decision log than to look back four months, eight months, from the previous times to look for that. You might have deleted it or something like that. So you want to remove the headache from that scenario.

And then the last thing is the budget spend cadence. That's going to be something where you want to have a regular meeting to review the spending against the approved budget on a very fixed schedule. It could be once a month, could be twice a month. It's going to be the project lead and the finance lead; they're going to meet together. It doesn't have to be the whole project and finance team; it just could be a couple from each, the true leaders of the project. But you want to make sure that the leads of the project and the finance are meeting to talk through the spend. You want to make sure you look at the burn rate against the timeline, the match you have documented so far, and any line items heading over or under. You want to be able to catch the problem early in the process.

If you're looking to forecast ahead and you realize, "Oh, this is going to be an issue eight months from now," then get ahead of it right then and there. And that budget spend meeting, being established with just two or three important people from the aspects of the project — whoever's leading it and the finance person — those meetings are going to pay off in the end when it comes to solving issues that might appear throughout the process. So those are four good habits to establish for any organization that has to do some post-award grant management. We do have a free workbook that you can use at your discretion, which is right there, and it's based on what I talked about today. I really hope you found this conversation helpful. I really appreciate the opportunity to share, and I will let Ashley take it from here.

Grants Office Services

Ashley Schultz:

Thanks so much, Joe. So folks, I have four questions so far — definitely some folks in the crowd who have experienced some stressors coming from pre-application to post-application work. If you have any additional questions, the bottom right-hand corner of the screen is going to be where our chat is.

Guidance for Grantseekers

First and foremost, I just want to quickly say, if you need some more guidance on the process of finding and applying for grants, I would pull your attention towards the Grants Office website. We have two decades of grants content waiting to be read and watched and enjoyed on that site. Actually, if you have been there before and you go there today, you might notice that it looks pretty different. We actually did a full rebrand last week. We're very much in love with the website. I encourage you to go over there and check it out. Our Guidance for Grantseekers page is my very favorite; it has a series of videos that take you through the entire application process, from finding the right grant, to building the right team,

to polishing off the draft before you click submit. Everything on that site is totally free and is powered by the folks here on the Grants Office team.

Paid Services

I will also call your attention to Grants Office's paid services. Our team here is filled with folks just like Joe. We have a 25-plus-year reputation across both the United States and Canada in proposal development work. So we help organizations just like yourself to plan out and then articulate your project in a way that's going to speak to that funder's goals and objectives, and we also make sure that, in the event that you win, you can meet all those post-award requirements. Our most popular service is Research and Consultation; that allows you to sit down with a consultant like Joe, discuss your upcoming projects, and then be provided with a list of state, federal, and foundation grants that could best support those initiatives.

We also have project building and proposal writing services that, again, allow you to sit down with a consultant and build out a competitive application to the grant of your choosing. And then last but certainly not least, we have our subscription service, Grants Office Communities, which gives you access to our database. There are almost 10,000 state, federal, and foundation funders. You can do the research and the project building all on your own, inside of a platform that our team here, the people of Grants Office, built. Grants Office Communities always has a free two-week trial, so if you have not gone over to check that out yet, I encourage you to do so.

Q&A Session

So now we're going to hop into the Q&A, and I just want to very quickly note: I know we saw a couple of things in the chat about that QR code for the workbook. The QR code for the workbook is currently taking you to the landing page of the entire event. Tomorrow, that landing page will have this video, also the slides, also the transcript, and also that workbook. So, folks who put that into the chat to say that that link isn't working, I'm so sorry; it will be there tomorrow, and all the resources that I just mentioned will be on that page.

Audience Questions

Q1: What happens if you can't hit the outcome targets that you put in the application?

So Joe, I have a couple of questions for you. Again, sounds like folks have had this happen to them before, so looking for some advice. One is talking about their targets, their performance targets. What happens if you can't hit your outcome targets that you put in the application?

Joseph Phelan:

As soon as you can — as soon as you realize that you're not going to be able to meet them — let them know. Let the funder know. Don't wait for that final report and say, "Oh, we didn't meet these outcomes that we had targeted." So definitely, as soon as you realize that, hey, this is going to happen, let them know as soon as possible. And come prepared with what happened, what you've done about it, what you propose, what you need from them, those types of things, because sometimes funders aren't going to tie results to payments and things like that. So definitely, as soon as you know about it, let the funder know and have a conversation with them about it.

Q2: What do we do if we haven't spent all the money and need more time, or if our prices have increased since we were approved?

Ashley Schultz:

I have two questions here about budget — very different ends of the spectrum on budget questions, but I'll give them to you at the same time, so maybe you can answer them at the same time. One is, what do we do if we haven't spent all the money and need more time to spend it? And another is, what do we do if the prices that we put in our grant application have increased since we got approved?

Joseph Phelan:

Great question. I'll take the first one first, about extensions. Whether it's written in the notice of funding, or as you're preparing your reporting requirements you realize that you have extra funds to spend, you can request an extension with those funds. So that's something that you can definitely do: try to get that extension to then use the rest of the funds. When it comes to the second, that's where this decision log comes in. You can ask for more money, explain the reason behind it, and be straightforward and honest about that. So there definitely are some examples of that, as well as to reach out to the funder, based on your grant agreement, and see if there could be some additions to the award amount itself based on the changes that are required.

Q3: What happens if we forgot to add something to our budget?

Ashley Schultz:

Okay, great. And I just got another one that was tagging onto this: What happens if we forgot to add something to our budget?

Joseph Phelan:

So, similar, in the sense that you can always try to move the money around and make it work. You can ask for an extension, or you can ask for a change of scope. You're not guaranteed to get one of those, but it's definitely possible. Issues do come up, and you do forget things, but being able to move line items can be tough, but you would need some sort of approval from the funder itself.

Q4: How long do you suggest keeping grant records?

Ashley Schultz:

Thank you. And then the last question I see here is, how long do you suggest keeping grant records?

Joseph Phelan:

It's a great question. It's going to depend on the rules that are established by the federal agency or the provincial agency, depending on where you're coming from. It could be in the agreement itself, but the general retention period is going to be three years from the final report. So it's something that's three to five years, but three years is, I think, a good baseline to hold on to your grant records.

Q5: Is it OK to budget a percentage of a cost for the people who will oversee the project?

Ashley Schultz:

Great. And I promise that was the last question, but I just saw another one come in, and it's a really great question. Is it OK to add some budget, maybe like a percentage of a cost, for the folks who are going to be spending time overseeing the project?

Joseph Phelan:

Yeah. It definitely will depend on the actual grant itself, for sure, if they allow for that as an allowable cost. But yeah, if you can be as specific as possible when it comes to who's overseeing the project, that can definitely be included in your application.

Closing

Ashley Schultz:

Thank you, Joe, and thank you to all of you for asking those really great questions. As I mentioned, all of the resources — the recording, the slides, the transcript, and the worksheet that Joe mentioned — are going to be available on our website starting tomorrow. We also have all of our past events, and all the recordings and all the materials that went along with them, on the website. Definitely check them out first thing tomorrow. And thanks again to all of you for attending here today. Feel free to reach out if you have any questions. Again, visit us online. Try Communities for 14 days free. And we hope to see you on another Grantscast here in the very near future. Have a great one.

— End of Transcript —

Grants Office, LLC • empowering communities • Recorded November 19, 2026

About This Transcript

This transcript was generated using Webex's automatic caption feature and subsequently reformatted with the assistance of artificial intelligence. While we make every effort to ensure accuracy, errors may remain. If you notice a discrepancy, we welcome your corrections — please reach out to education@grantsoffice.com.

Live sign language interpretation is available upon request for future Grantscast® events. To request an interpreter or learn more about accessibility accommodations, please contact accessibility@grantsoffice.com.