



Grand Rapids Community College
Guide to Grants Management

January, 2010

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INTRODUCTION

Congratulations! Your grant proposal has been selected and you are ready to begin implementing the initial phase of your project according to your contract.

This handbook will serve as your guide to managing the grant. It was created to help increase your success and minimize any problems that may arise.

Please note that the activities undertaken in the first few weeks of project implementation are crucial to the overall success of your project. These activities will not only set the tone for your project, but will also determine several important factors such as:

- Will you be on target to meet your goals?
- Will you expend all of the awarded funds?
- Will the project documentation hold up under the scrutiny of an audit?

Please be sure that you are familiar with the grant proposal, the award letter, the terms of the grant and GRCC's policies and procedures. Being aware of what you can and cannot do and how best to do it will save you potential problems in the future.

While this Grants Management Guide will serve as a reference, please don't hesitate to contact the Grants Office if questions arise about grants management procedures:

Director of Grants and Resource Development	Grants Coordinator
Judith Larsen Annex, College Park Plaza Building Phone: 234-3910 E-mail: jmlarsen@grcc.edu	Lisa Dopke Annex, College Park Plaza Building Phone: 234-3340 E-mail: ldopke@grcc.edu

STEP ONE

AWARD LETTER AND CONTRACT PROCESSING

Funding agencies usually will inform the person listed on the grant proposal as the lead contact person about a new or continuation grant award. Don't assume that the Grants Office has been informed about a grant award, especially if you are listed as the lead contact person. Please contact the Grants Office as soon as possible upon receiving an award letter.

Copies of all award letters and contracts must be received by the Grants Office for inclusion in grant files and the database.

Please note that grant contracts can be signed **ONLY** by the President or Vice President of Finance of the College. They are the only individuals authorized to enter into a binding monetary agreement for GRCC. The grant contract is a legal agreement between the College and the funding agency that holds the College accountable for delivering the outcomes set forth in the contract and for managing all grant monies. Please follow the procedures listed below to process all new and continuation grant awards:

<input checked="" type="checkbox"/>	Grant Award and Contract Processing Checklist
	1. Inform the Director of Grants and Resource Development about your grant award and work with the Grants Office to set up a post-award grant meeting to review policies and procedures.
	2. Forward a copy of the award letter and/or signed contract and grant budget to the Director of Grants and Resource Development and the Grant Accounting Specialist and keep a copy for your files.
	3. Carefully review the grant proposal and your award letter and/or contract to verify the award amount, the budget breakdown, timelines and reporting requirements.
	4. Obtain authorized signatures on contracts in a timely manner.
	5. Following the post-award grant meeting, start a grant file. Refer to page 3 of the <i>Guide to Grants Management Manual</i> for more information.
	6. Add progress report deadlines to your calendar. These reports must be submitted to the grants office a minimum of five (5) working days prior to the deadline.
	7. Review funding agency's policy on publicity. Contact the Communications Department to discuss press release and print materials.
	8. The Grants Office will forward a copy of the award letter and/or contract and final grant budget to the Grant Accounting Specialist to initiate budget set-up. Verify budget set-up with the Grant Accounting Specialist.
	9. For awards over \$50,000, the GRCC Board of Trustees (BOT) must approve the award as part of its consent agenda items. The Director of Grants and Resource Development will work with you to coordinate a date on which you can be present at the BOT meeting and will forward the grant information to the President's office for inclusion in the BOT agenda.
	10. File annual Institutional Review Board paperwork with the Institutional Research and Planning Dept. if evaluation activity involves research and human subjects.

INITIAL PROJECT START-UP

For every new grant received, work with the Grants Office to set a post-grant award meeting. At this meeting, the following details will be reviewed:

- Specify “next steps” and timelines for project implementation and planned activities
- Review the grant requirements of the funding agency
- Establish a system for record keeping
- Review the personnel hiring process
- Review Time and Effort Certifications and Staffing Allocation forms
- Review issues, policies and procedures pertaining to equipment and supply purchases and consultant subcontracting as applicable
- Review reporting requirements and report due dates
- Address other issues of concern as needed

See Appendix A for checklists that include the steps necessary to manage a grant-funded project.

START A GRANT FILE

For each new grant project, start a file that holds the following documentation:

- Original Request for Proposal (RFP)
- Grant guidelines
- Copy of the final grant proposal
- Final copy of the approved budget
- Award letter
- Grant contract
- All correspondence with the funding agency
- Progress reports
- Budget reports
- Copies of the receipts for purchases made with grant funding

This file is very important! Remember, grant files can be subject to an audit.

STEP THREE

INITIAL PROCESSING OF GRANT FUNDS

Once an award letter/contract and project budget is received by the Grant Accounting Specialist, a grant account for the project will be set up to handle fund transfers and accounting. Most funding agencies use electronic wire transfers to credit your grant account. This will be set up by the Grant Accounting Specialist. If a funder sends a check to you directly for the project, immediately deliver it personally to the Grant Accounting Specialist who will determine the appropriate account number and deposit the check. Checks that are received by the GRCC Foundation office should be delivered to the Grant Accounting Specialist who will determine the correct account number and then return the check to the GRCC Foundation for deposit.

GRCC Grant Accounting Specialist

Jim Holyfield

Business & Financial Services, 3 rd Floor, CPP

Phone: 234-4016

E-mail: jholyfie@grcc.edu
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ESTABLISH YOUR BUDGET WITH THE FINANCE OFFICE

GRCC's Grant Accounting Specialist will help you set up the project's financial account based on the approved budget and will review the fiscal management process with you. It is very important that you become familiar with the line items and amounts of the budget as approved by the funder. You and your department BCO are responsible for initiating or approving all direct charges to the project's financial account. If budget revisions are required due to reduced funding amounts, work with the Grant Accounting Specialist and inform the Grants Office about the revised budget.

Please follow the procedures listed below to initiate all new grant budgets:

<input checked="" type="checkbox"/>	Grant Budget Initiation Procedures Checklist
	1. Set up a meeting with the Grant Accounting Specialist and your department BCO to: <ul style="list-style-type: none">➤ Review and/or revise the final grant budget➤ Establish project start-up and end dates➤ Discuss funding draw down and invoicing procedures➤ Establish dates for financial reporting compliance according to the grant agreement/contract
	2. Verify that budgeted line items for the project have been established within PeopleSoft account codes by the Grant Accounting Specialist.
	3. Review the allowable expenditures in the grant budget before making a purchase, contracting with a vendor, or charging the grant for travel expenses. All expenditures must be compliant not only with the final approved grant budget, but must also comply with College policy.

Contact the Grant Accounting Specialist periodically to:

- Review your grant's financial status
- Receive help interpreting your budget report
- Address questions about fiscal management
- Obtain information on cumulative expenditures that may be needed when you are preparing a continuation proposal for your grant
- Receive assistance with payroll procedures and forms for persons hired with grant funds
- Prepare fiscal reports for grant billings

It is imperative that you spend all funds in a timely and prudent manner. Grant budget reports must be consistent with grant narrative and data reports. If issues arise with project implementation that will impact the project budget, please contact the Director of Grants and Resource Development and Grant Accounting Specialist as soon as possible and well before reports are due.

BUDGET REVISIONS DURING THE COURSE OF THE PROJECT

Project Directors may expend funds only in the line item categories and amounts listed in the approved budget. The approved budget, whether negotiated with the funder or approved in the proposal, constitutes part of a legal contract.

Federal and state guidelines are usually flexible enough to allow minor (-10%) line item changes within the total budget without prior approval from the agency. If a larger change is anticipated, discuss the changes with the Grant Accounting Specialist *before making a commitment to purchase*.

The Grant Accounting Specialist will work with you and the Director of Grants and Resource Development to determine if funding agency guidelines (i.e., through EDGAR) allow for the proposed budget change. The Grant Accounting Specialist may contact the program officer at the funding agency to discuss the possibility of the change and to determine the appropriate forms or format of the agency to formally request the change. Upon receipt of the request, funding agency personnel will deliberate and officially approve or disapprove the change in writing. **No budget changes may be made until official written approval is obtained.** This may take several weeks, so it is important to make adjustments as early as possible. The Grant Accounting Specialist will use the PeopleSoft transaction process to make the budget change which results in notification to the BCO of the transaction. The Grant Accounting Specialist will forward the revised budget and copies of approval letters to you and to the Director of Grants and Resource Development.

STEP FOUR

TRACK TIME AND EFFORT

College and government policies require the accurate and timely reporting of the effort of all faculty members or staff employees paid from and/or contributing effort to federally-funded and state-funded projects. It is important to maintain a record of who is spending time working on your project and how many hours they work, should your grant be subject to an audit. It is required that a Time and Effort Certification form (see Appendix C) be filled out by each faculty or staff person who charges or contributes time to a grant project. This form must be returned to the Grant Accounting Specialist at the start-up of the grant and periodically during the grant period, as specified by grant requirements and the Grant Accounting Specialist.

Faculty participation is typically charged to a grant during the academic year (i.e., contract period) via release time or re-assignment on their faculty load sheet. Project Directors should work with the Human Resources Generalist assigned to the academic group to determine appropriate procedures for charging faculty time to the grant.

All forms are available in electronic format on the Grants Office webpage: www.grcc.edu/grants

Please follow the procedures listed below for ongoing management of all grant budgets:

<input checked="" type="checkbox"/>	Ongoing Grant Budget Management Procedures
	1. Review the allowable expenditures in the grant budget before making a purchase, contracting with a vendor, or charging the grant for travel expenses. All expenditures must be compliant not only with the final approved grant budget, but must also comply with College policy.
	2. Complete a Time and Effort Certification Form for each individual working on the grant and return it to the Grant Accounting Specialist at the start-up of the grant and periodically thereafter as required by the grant award/contract.
	3. The Grant Accounting Specialist will provide account availability reports (on the S: drive) that are updated daily. Review these reports on a regular basis.
	4. Add fiscal report deadlines to your calendar. Remember that budget reports must comply with grant narrative and data reports.

REQUIRED REPORTING

NARRATIVE REPORTS

Reporting requirements are specified in your grant contract. While some contracts require interim reporting, others only require end-of-year narratives and fiscal reports. Some funders require both. The Grants Office will send reminders that reports are due based on funding source requirements. A schedule for preparation and submission of reports will be set up during your post-grant award meeting.

It is your responsibility as the Project Director to keep adequate records, prepare all reports on time as outlined in the grant contract and to obtain the necessary signatures on report documents.

While the Project Director is responsible for preparing the narrative report, **all reports MUST be reviewed and, in the case of local foundation grants (and others as required by the Director of Grants and Resource Development), submitted by the Grants Office.** Reports should be provided to the Grants Office a *minimum* of **five (5) working days** prior to the due date to allow for adequate review time.

The Project Director should work closely with the Institutional Research and Planning Department to plan for adequate time for compilation of data regarding the project.

Tips for successfully preparing the narrative program report:

- **FOLLOW ALL INSTRUCTIONS** properly. Note if there is a word limit, page limit, indication of font, type or margins. Take care to fully address specific questions posed by the funder.
- Review the guidelines outlined in your contract to ensure that each goal, objective and activity that you identified in the proposal is addressed.
- If there were unanticipated challenges or goals were not fully attained, these exceptions must be clearly explained.
- When completing a grant report avoid fancy language or jargon. Be clear and concise. Tie your outcomes directly to your goals.

FISCAL REPORTS

The Grant Accounting Specialist must prepare all fiscal reports or verify the accuracy of reports (reports must agree with the ledger). Fiscal reports generally consist of a spreadsheet displaying the final approved grant budget alongside the expended budget. Issues occasionally arise when attempting to reconcile the differences between the funder and the College budget line items.

The Project Director should work with the Grant Accounting Specialist to ensure that the narrative report is in compliance with budget records. ***The Grant Accounting Specialist must prepare all fiscal reports or verify the accuracy of reports (reports must agree with the ledger).***

STEP SIX

CONCLUSION OF THE PROJECT

Closing out the grant project involves making sure that all grant contract activities have been accomplished. Throughout the course of your project, progress should be reviewed periodically to ensure that all deadlines according to the grant contract timeline are being met and that the project goals and activities are attained or are on target for completion. Doing so will greatly simplify the close out process.

It is highly recommended that you review the following Grant Close Out Checklist at least three (3) months prior to the end date of your project.

<input checked="" type="checkbox"/>	Grant Close Out Checklist
	1. All grant project files are up-to-date.
	2. All supply and equipment purchases are complete (i.e., received, installed and paid for).
	3. All Time and Effort Certification Forms have been completed and filed, and staff has been paid.
	4. Formal project evaluation has been completed.
	5. Institutional match and in kind contributions are completed and documented as required by the grant.
	6. Fiscal report is completed, certified by the Grant Accounting Specialist, and submitted to the Grants Office a minimum of five (5) business days prior to the due date.
	7. Final narrative program report is completed and submitted to the Grants Office a minimum of five (5) business days prior to the due date.

ADDITIONAL INFORMATION

VENDORS VS. INDEPENDENT CONTRACTORS AND CONSULTANTS

Most vendors are businesses, suppliers, contractors, and subcontractors who sell goods and services to GRCC through the purchase requisition process.

Before hiring an independent contractor, a request for independent contractor status must be obtained from the Executive Director of Human Resources, Staff Relations and Employment who evaluates the request to determine the contractor status and then notifies the BCO and financial services. Project outline/description/outcomes should be provided and documented by the BCO.

AUDIT READINESS

When an organization receives federal funds, it is responsible for using those funds in accordance with laws and regulations. The recipient must use fiscal control and accounting procedures to ensure the proper disbursement of, and accounting for, these funds. The effective management of public funds should be a result of ongoing activities that ensure audit readiness, such as:

- **Administrative controls** - the plan of organization and procedures and records related to authorizing transactions.
- **Accounting controls** - the plan of organization and procedures and records concerned with assets and reliable financial records.
- **Compliance with Federal requirements** – such as charges for direct labor, reporting of financial status, treatment of grant-related income, eligibility of participants, monitoring of activities and allowability of services.
- **Records** – should include information adequate to support statements in the application document and should be retained for the required period of time.
- **Internal audits** - may be requested by the grant recipient to help determine whether controls are adequate.

Each agency publishes its guidelines for the proper management of funds, including allowable and unallowable costs. These are available on each agency's website.

QUICK REFERENCES

- 1. Helpful Hints for Grants Management**
- 2. Grants Post-Award Responsibility Matrix**
- 3. Contact Information**
- 4. Appendices**

HELPFUL HINTS FOR GRANTS MANAGEMENT

1. **During the start-up phase of your grant project:**
 - Enter all dates into your GroupWise calendar according to the project timeline.
 - Schedule the initial meetings with the Grants Office and the Grant Accounting Specialist.
2. **Ask enough questions.** As a new Project Director the sheer volume of information can be daunting. The grant project and its proper management are important. This handbook provides the basics, but the Grants Office is here to assist you.
3. **Set aside time at regular intervals to manage your grant.** Depending on the size and complexity of the grant, this may require one or more hours per week.
4. **Read your mail and follow up meetings with an e-mail or memo.** Academic communities communicate in writing. Paper and e-mail trails protect the grant, the College, and grant administrators from misunderstood communications. Copy your supervisor, and in some cases the Grants Office, on e-mails and keep hard copies of all documents and correspondence in your grant project file.
5. **Credit the funder.** On any piece of printed material, whether a press release, brochure, or major product, a credit line should appear, listing the funder by its full name. If oral presentations are given to community groups, the funder should be credited. Work with the Grants Office to ensure that specific funder guidelines regarding such communications are being followed.
6. **Provide lead time.** The grant project is one of many impacting GRCC services. People work best when adequate lead time is provided. Grants frequently deviate from routine College activities, thus more lead time is often needed to make special arrangements for grant activities. Be considerate and plan ahead.
7. **Don't lobby, don't politic, and don't support religious activities.** All of these interesting activities are strictly prohibited with grant funds. This includes using staff time for any of these activities. Support letters for legislation cannot come from project staff. If in doubt, contact the Grants Office.
8. **Do not purchase from relatives or friends.** Be sure to complete the Supplier Application that is available online on the Purchasing Department webpage.
9. **Keep the Grants Office informed and address problems before they become a crisis.** Any grants project has the potential for going awry. Contact your supervisor and/or the Grants Office if things begin to get off track and to find early solutions.

AND PERHAPS MOST IMPORTANT...

10. **Keep up with the budget.** Grant funds represent the end result of a highly competitive process with other colleges. They are an investment by the public or private entity in GRCC's future. The College will be held accountable for its stewardship of those funds.
11. **Meet all reporting deadlines.** Grant reports must always be filed by the due date – no later! Mark all due dates ahead of time on a yearly calendar and remember that your reports must be submitted to the Grants Office for review or submission *at least five (5) days* prior to the deadline. Complete all reports as if you plan to apply for funding again.

The matrix below lists most, *but not all*, post-grant award responsibilities. Please refer to pertinent sections of the Guide to Grants Management for additional information on specific responsibilities.

GRAND RAPIDS COMMUNITY COLLEGE		
Grants Post-Award Responsibility Matrix		
Project Director	Grants Office	Grant Accounting Specialist
Inform Grants Office and Grants Accounting Specialist about grant award and set up the post grant award meeting.	Update grants files and database.	Interpret agency policies and procedures as they relate to the budget.
Forward grant award letters and contracts to Grants Office and deliver checks received to the Grant Accounting Specialist.	Forward award letters, contracts and budgets to Grant Accounting Specialist.	Establish account codes within PeopleSoft system.
Secure signatures on contracts and agreements and send copies to Grants Office.	Update grants files and database.	
Attend Board of Trustees meeting to obtain approval for grants over \$50,000.	Place approval for grant awards over \$50,000 on BOT consent agenda.	
Review the grant requirements of the funding agency, including reporting requirements.	Review grant requirements and management procedures at post-grant award meeting.	Review grant requirements and management procedures at post-grant award meeting.
File annual Institutional Review Board paperwork with the Institutional Research and Planning Dept. if activity involves research and human subjects.		
Work with Grant Accounting Specialist to review/revise grants budget and establish financial management procedures.		Review and/or revise final grant budget, establish start/end and reporting dates, set up draw down/invoice procedures, verify matching funds and in-kind contributions.
Work with the Communications Dept. to issue press releases and develop print materials.	Assist in the coordination of publicity regarding award.	
Work with Human Resources during the personnel hiring process and adhere to Human Resource policies.		
Certify employee effort related to project using the <u>Time and Effort Certification Form</u> and submit to Grant Accounting Specialist.		File all Time and Effort Certification statements.
Work with Purchasing Dept. and follow policies regarding equipment and supply purchases.		Approve all purchase requisitions.

GRAND RAPIDS COMMUNITY COLLEGE
Grants Post-Award Responsibility Matrix

Project Director	Grants Office	Grant Accounting Specialist
Monitor account availability reports; contact the Grant Accounting Specialist regarding discrepancies.		Provide account availability reports and forecast budget spending plan.
Discuss budget changes, project extensions and carry-over funds with the Grant Accounting Specialist.		Answer questions related to monthly budget reports, report carry-over funds.
Contact Grant Accounting Specialist when invoices are needed.		Send invoices to funding sources and partners; deposit checks from funding sources.
File progress reports on time with the Grants Office – <i>five (5) working days</i> prior to due date.	Review all reports and assist in preparation and submission of local foundation or other agency reports as specified by Grants Office.	Review narrative reports and prepare or verify accuracy of all fiscal reports.
Secure agency approval for budget transfers, change of scope or project extensions and inform Grants Office and Grant Accounting Specialist about changes.	Update grants files and database.	Interpret agency policies and procedures as they relate to the budget.
Spend down budget to \$0 according to the proposed budget.		Prepare close out financials for the project.
Perform project close out activities.		

QUICK REFERENCE CONTACT INFORMATION		
<p>Director of Grants and Resource Development</p> <p>Judith Larsen Annex, College Park Plaza Phone: 234-3910 E-mail: jmlarsen@grcc.edu</p>	<p>Grant Accounting Specialist</p> <p>Jim Holyfield 3rd Floor, College Park Plaza Phone: 234-4016 E-mail: jholyfie@grcc.edu</p>	<p>Executive Director of Human Resources, Staff Relations and Employment</p> <p>Cathy Wilson 4th Floor, College Park Plaza Phone: 234-3971 E-mail: cwilson@grcc.edu</p>
<p>Grants Coordinator</p> <p>Lisa Dopke Annex, College Park Plaza Phone: 234-3340 E-mail: ldopke@grcc.edu</p>	<p>Assistant to Executive VP of Business & Financial Services</p> <p>Cherry Scaturro Business & Financial Services 3rd Floor, College Park Plaza Phone: 234-4033 E-mail: cscaturr@grcc.edu</p>	<p>Associate Director of Communications</p> <p>Vicki Hudson Mezzanine, College Park Plaza Phone: 234-4206 E-mail: vhudson@grcc.edu</p>
<p>Human Resources Generalist (Academic Group)</p> <p>Jim Fox 4th Floor, College Park Plaza Phone: 234-3179 E-mail: jfox@grcc.edu</p>	<p>Human Resources Generalist (Administrative Groups)</p> <p>Jessica Berens 4th Floor, College Park Plaza Phone: 234-3179 E-mail: JBerens@grcc.edu</p>	

APPENDICES

Appendix A: Grant Check Lists

Appendix B: Post-Award Grant Meeting Checklist

Appendix C: Time and Effort Certification Form

Appendix A: Grant Checklists

<input checked="" type="checkbox"/>	Grant Award and Contract Processing Checklist
	1. Inform the Director of Grants and Resource Development about your grant award and work with the Grants Office to set up a post-award grant meeting to review policies and procedures.
	2. Forward a copy of the award letter and/or signed contract and grant budget to the Director of Grants and Resource Development and keep a copy for your files.
	3. Carefully review the grant proposal and your award letter and/or contract to verify the award amount, the budget breakdown, timelines and reporting requirements.
	4. Obtain authorized signatures on contracts in a timely manner.
	5. Following the post-award grant meeting, start a grant file. Refer to page 3 of the Guide to Grants Management Manual for more information.
	6. Add progress report deadlines to your calendar. These reports must be submitted to the grants office a minimum of five (5) working days prior to the deadline.
	7. Review funding agency's policy on publicity. Contact the Communications Department to discuss press release and print materials.
	8. The Grants Office will forward a copy of the award letter and/or contract/final budget to the Grant Accounting Specialist for budget set-up. Verify budget set-up with the Grant Accounting Specialist.
	9. For awards over \$50,000, the GRCC Board of Trustees must approve the award as part of its consent agenda items. The Director of Grants and Resource Development will coordinate a date on which you can be present at the BOT meeting and process the grant information for inclusion in the BOT agenda.
	10. File annual Institutional Review Board paperwork with the Institutional Research and Planning Dept. if evaluation activity involves research and human subjects.
<input checked="" type="checkbox"/>	Grant Budget Initiation & Ongoing Budget Management Procedures Checklist
	1. Set up a meeting with the Grant Accounting Specialist and your department BCO to: <ul style="list-style-type: none"> ➤ Review and/or revise the final grant budget ➤ Establish project start-up and end dates ➤ Discuss funding draw down and invoicing procedures ➤ Establish dates for financial reporting compliance according to the grant agreement/contract
	2. Verify that budgeted line items for the project have been established within PeopleSoft account codes by the Grant Accounting Specialist.
	3. Review the allowable expenditures in the grant budget before making a purchase, contracting with a vendor, or charging the grant for travel expenses. All expenditures must be compliant not only with the final approved grant budget, but must also comply with College policy.
	4. Complete a Time and Effort Certification Form for each individual working on the grant and return it to the Grant Accounting Specialist at the start-up of the grant and periodically thereafter as required by the grant award/contract.
	5. The Grant Accounting Specialist will provide account availability reports (on the S: drive) that are updated daily. Review these reports on a regular basis.
	6. Add fiscal report deadlines to your calendar. Remember that budget reports that must comply with grant narrative and data reports.

<input checked="" type="checkbox"/>	Project Director 's Monthly Grant Management Checklist
	1. Verify that all grant project files are up-to-date.
	2. Review account availability reports (on the S: drive). These reports are updated daily.
	3. Review the allowable expenditures in the grant budget before making a purchase, contracting with a vendor, or charging the grant for travel expenses.
	4. Review fiscal and progress report deadlines. Complete reports as needed. Note: Narrative reports are due to the Grants Office a minimum of five (5) working days prior to the deadline.
<input checked="" type="checkbox"/>	Grant Close Out Checklist
	1. All grant project files are up-to-date.
	2. All supply and equipment purchases are complete (i.e., received, installed and paid for).
	3. All Time and Effort Certification Forms have been completed and filed, and staff has been paid.
	4. Formal project evaluation has been completed.
	5. Institutional match and in kind contributions are completed and documented as required by the grant.
	6. Fiscal report is completed, certified by the Grant Accounting Specialist, and submitted to the Grants Office a minimum of five (5) business days prior to the due date.
	7. Final narrative program report is completed and submitted to the Grants Office a minimum of five (5) business days prior to the due date.

Appendix B: Post-Award Grant Meeting Checklist

Please initial this column to verify completion	Post-Award Grant Meeting Checklist
	1. Prior to meeting, forward a copy of the award letter and/or contract and grant budget to the Grant Accounting Specialist to initiate budget set-up.
	2. Review the grant contract and/or requirements of the funding agency.
	3. Review advice on record keeping procedures – Refer to page 3 of the <i>Guide to Grants Management Manual</i> .
	4. Review issues, policies and procedures pertaining to equipment and supply purchases and consultant subcontracting as applicable.
	5. Review the personnel hiring process.
	6. Review the <u>Time and Effort Certification</u> form.
	7. Review reporting requirements and report due dates.
	8. Review “next steps” and timelines for project implementation and planned activities.
	9. Address other issues of concern as needed.
10. Verify the following for entry into the database:	
Budget start/end date:	
Project start/end date:	
Actual amount received:	
Report due dates:	
Percent of time Project Director will devote to the project:	
Percentage of funds to be allocated to the department :	
Names of employees supported grant salary/fringe/title/start date:	
Names of employees supported, % of time on grant, and employee type:	
Space usage: building/room/percent	
Description of any project modifications:	



Time and Effort Certification Form

College and government policies require the accurate and timely reporting of the effort of all faculty members or staff employees paid from and/or contributing effort to federally-funded and State-funded projects. To comply with grant requirements, **please complete and return this form to the Grant Accounting Specialist.**

Employee Name: _____ Department: _____ Position: _____

Employee ID: _____ Account Number: _____

For the period from: _____ to _____

Form to be completed (as determined by grant requirements): Bi-weekly Monthly Semi-annually

Project Title	Function Performed	% FTE	# Hours Worked	% Time & Effort
Grant Funded Activities				
Non-Grant Related Activities				
TOTALS				100%

I certify that the distribution of activities, expressed in actual percentage of total effort, represents a reasonable estimate of all work performed by me during the time period.

Employee

Date

I certify that I have firsthand knowledge of all the work performed by the above employee and that the above time distribution represents a reasonable estimate of the work performed during the indicated time period.

Project Director/Supervisor

Date

Note: The workload cost distribution will be changed to reflect the actual percentage of total effort as certified above.