



Grant Agreement Management

This Information applies to Grant Award Agreements.

For questions about Contracts/Consultant Agreements, contact your assigned program officer.

Once grants are awarded, partners are notified via their program officer, and a grant agreement is sent electronically. The agreement is sent to all authorized signatories, in order, through CongaSign (via e-mail) for signature. Once signed by the Health Foundation CEO, all parties receive a fully signed and executed copy via e-mail. The grant agreement includes the grant period, payment and reporting schedules, and other grant requirements. Please refer to your grant agreement for specific requirements.

The topics below provide a general overview of the grants management process.

Budget

How should partners track Health Foundation funds?

Partners may track funds in any manner but grant dollars should be easily identifiable in the partner's financial system. If a budget report is required for the grant, the Health Foundation will provide a budget reporting template for tracking and use.

Can grant expenses be incurred prior to the start date of the award?

Costs incurred prior to the grant start date are not allowable. Expenses must be spent within the grant period and consistent with the approved grant budget if applicable.

Can funds be expended for items not identified in the approved budget?

Grant agreements with project budgets require prior approval by your program officer for changes to the approved budget.

What happens if the approved budget for each year is not spent?

Funds not spent in the year budgeted are carried over to the remaining grant year(s) for the same line items unless the underspend is a significant percentage of your yearly award amount. Budget reports and decisions around underspend are discussed with your program officer, the grant and finance manager, and your organization. If necessary, a no-cost grant extension can be requested prior to the grant end date. If all grant funds are not expected to be spent by the grant end date, contact your program officer.

Reporting

How are reports submitted and what information is required?

Reports are submitted through our online portal, or through direct contact with your program officer. Reports have a reflection report as well as a financial report, unless otherwise noted by your program officer and Grant Agreement. If you have a project grant, financial supporting documentation may be needed with your report if budget changes were not discussed. See your grant agreement for required documentation.

Where can report templates be found?

Reflection reports, and/or budget report templates are emailed to the primary contact approximately 60 days prior to the report due date (30 days prior to grant period end).

What if the partner experiences programmatic or financial challenges?

Program officers want and plan to be in touch throughout the year to understand how the program is going/successes/challenges, etc. If there are unforeseen obstacles outside of regular contact and check-ins, please reach out to your assigned program officer or the grants and finance manager so we can assist.

Payments

When are payments sent to partners?

The initial payment is processed and sent no more than 15 days after the grant agreement is signed. Subsequent payments are sent after receipt and approval of all required reporting as outlined in the grant agreement.

All grant funds must be expended within the project period unless a no-cost extension is issued or there has been prior discussion with your assigned program officer.

How do partners receive funding?

Partners receive funding through either paper check at the designated location, or an electronic payment method (bill.com). This information is decided and provided in your signed grant agreement.

All funds for the grant period are disbursed upon signing. If you have received a multi-year grant, subsequent funds will be disbursed after reports are finished.

The Health Foundation disburses all funds for the year and does not operate on a reimbursement or invoice schedule for grantees.

What to do if grant funds will not be used within the grant period?

All grant funds must be expended within the project period unless a no-cost extension is issued or there has been prior discussion with your assigned program officer.

Amendments

When is a formal grant agreement amendment needed?

An amendment may be needed when there are any changes to approved budgets, grant end dates, or grant activities. No cost extensions require approval from your program officer along with an official amendment.

Communications/Messaging

What are the requirements for publicity and the Health Foundation logo use?

Any use of the Foundation's name or logos must be consistent with the guidelines in the Grant Agreement. It is not necessary for all publicity associated with the grant to clearly identify the Health Foundation as the supporting changemaker. Partners can contact the communications officer for any marketing or communications questions. Additional storytelling resources may be found at thegrhf.org/share-your-story

Contacts

Who should be contacted if there are changes to the partner's contact and/or significant organizational changes?

Partners must notify the assigned program officer of any changes to project contact information or other significant changes within the organization.

Who should be contacted if there are any financial or budget related questions?

Partners can contact the grants and finance manager, and/or their assigned program officer.

Please refer to our [website](http://thegrhf.org) at thegrhf.org for any needed contact information.