**Standard Work Instructions**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Process:** | **Notice of (grant) Award meetings** | **Role:** | Grants Specialist, Accounting, Project Director | **Date:** | **10/3/2019** |

| **Process Step** | **Description**  **of Process** | **Notes** |
| --- | --- | --- |
| **1** | A notice of a grant award is received, and terms and conditions of the award are known. | Documents for this can vary; sometimes simply a letter. |
| **2** | The Grants Specialist reviews the formal agreement between grantee and the funding organization. |  |
| **3** | The Grants Specialist determines the need for a Notice of Award meeting. Criteria may include:   * Project director is new to grant management * The project is a new initiative at SBL and/or the funding source is new to SBL grant portfolio * Terms of the award suggest policies or procedures which are new to our organization | Notice of Award meetings may not be necessary in the case of very small grants, grants received annually under the same conditions or awards managed by experienced project directors. |
| **4** | Grants Specialist schedules the Notice of Award meeting to include:   * Project Director * Accounting * Grants Specialist * Others *ad hoc* (e.g., Payroll, representative of partnering departments or external organizations) |  |
| **5** | Grants Specialist prepares copies of materials for the NoA meeting   * Grant agreement * Project budget * NoA Checklist document | (see template) |
| **6** | Notice of Award meeting is held and includes these agenda items:   * Review of the terms of the award * Review of project’s planned budget categories * Review of reporting requirements * Review of roles and responsibilities * Review of record retention requirements * Scheduling of monthly meetings for transactions review |  |
| **7** | Action items, if any, identified during the NoA meeting are documented by the Grants Specialist with persons assigned to follow up (circulate list following meeting) |  |
| **8** | Additional meetings scheduled if needed |  |