**Standard Work Instructions**

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

| **ProcessStep** | **Description****of Process** | **Notes** |
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| **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
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| **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 |  |