



AHC Grants Management

Presented by the Institutional Grants Office:

Director

Grants Analyst II

Grants Analyst II

LeeAnne McNulty, Ed.D.

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Fern Robles, MA

The Purpose & Process

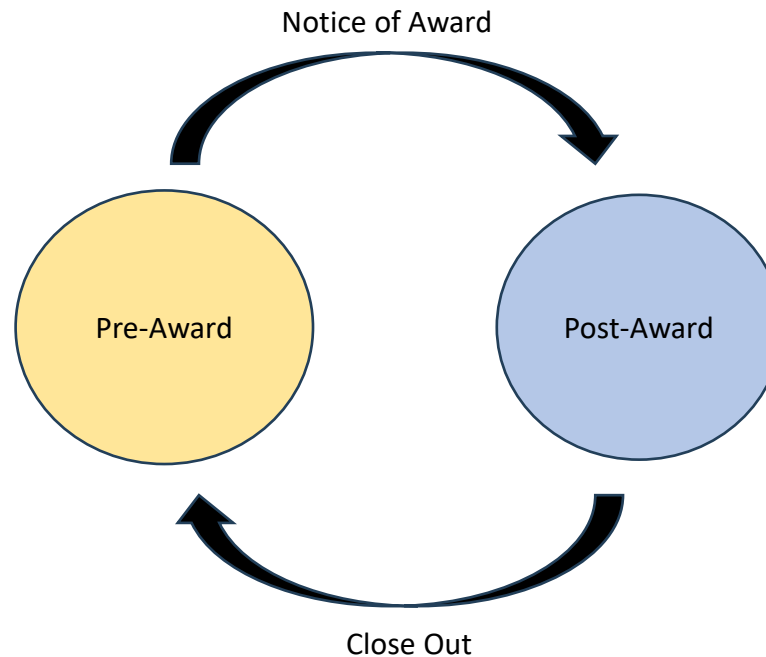
Grants management at Allan Hancock College



“What you do makes a difference, and you have to decide what kind of difference you want to make.”

Jane Goodall

Knowing the Difference





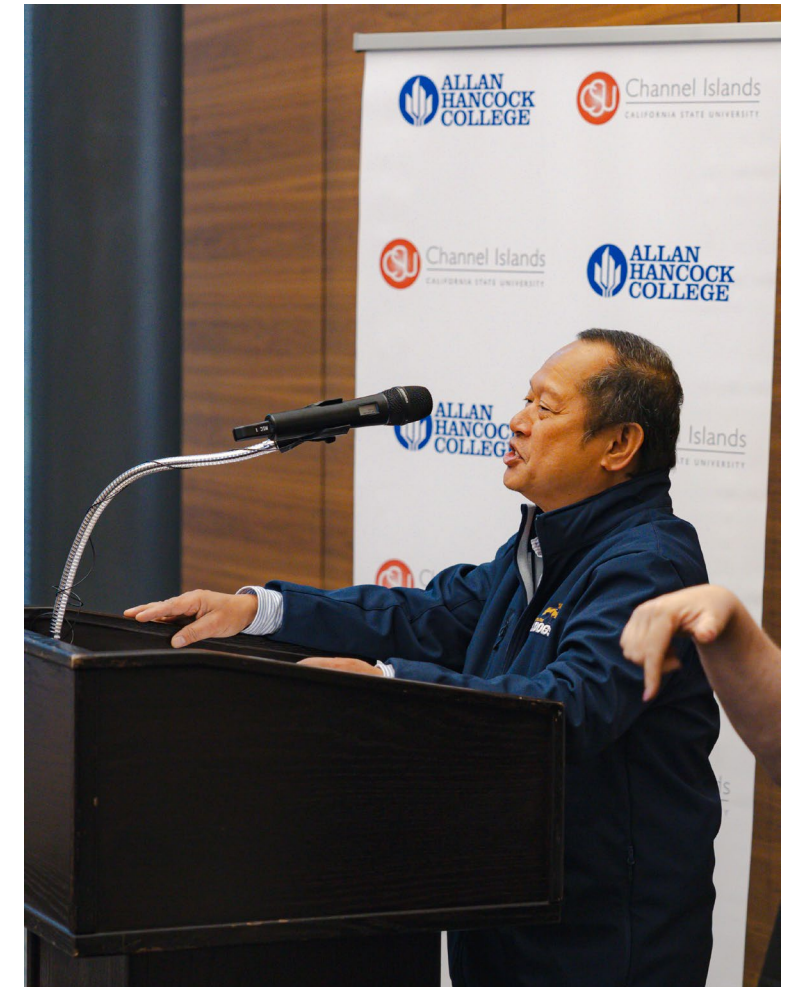
The Pre-Award Process

1. Researching the opportunity
2. Obtaining approvals
3. Set-up shared documents
4. Meetings to design the project & develop proposal
5. Present grants report to shared governance
6. Gathering partners and partnership agreements
7. Budget reviewed by Business Services
8. Submit the grant
9. Post Award Bridge

Post Award Process

- Grant Award Letter Arrives
 - MOUs or Subcontracts signed (if applicable)
- Communicate to Constituents
 - Press Release/Shared Governance
- FOAP & Grant Accountant Assigned
- Meeting with your AHC Grant Team
- Make a plan and then communicate it

Often this is where a PD is assigned and begins working on a grant!



Getting Started

You got the money... Now what?

Carrying out the Grant Agreement

The proposal, negotiated budget, program regulations, and notice of award set the parameters of the project. For this reason, the PD/PI must be familiar with six essential documents

Grant proposal

Negotiated
Grant Budget

Program policies,
procedures, and
requirements

GAN, Award
Letter

Board Action

Operational
Budget

Project Director/Principal Investigator are the expert in their grant – know the detail of the restrictions and objectives of your grants.

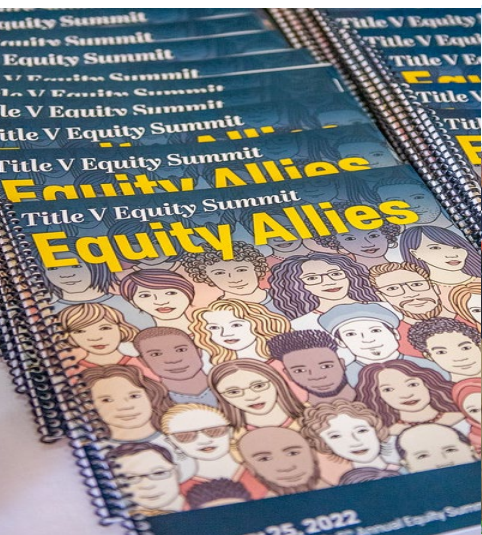


Achieving Project Goals/Outcomes

- The grant proposal = legal contract
- Changes to the contract require prior written approval from the funding source. These changes in project scope include:
 1. Changes in grant goals or objectives; and
 2. Changes in grant outcomes.
- Set up a data tracking system
- Plan reporting - set your calendar with due dates

Evaluation & Communicating Success

- **Evaluation**
 - Plan for data collection
 - Submit your reports
 - External evaluators
 - Get a contract
 - Make a plan to monitor
- **Communication**
 - Make a list of who needs to be informed
 - Save a record
 - Share the news!
 - On your department's website
 - Through Public Affairs



The Project Director/Principal Investigator

Responsibilities, the process, and the people who can help

A Project Director/Principal Investigator will...



1. Carry out the **grant agreement**



2. Achieve project **goals** and **outcomes**



3. Set up a **budget**



4. **Evaluate** the project



5. **Communicate** and **report** grant success



6. Build sustainability and **institutionalize**

PD/PI Responsibilities

- **Programmatic**

- Implement & document
 - project activities in accordance with stated goals, objectives, and timelines
- Maintain a project file
 - proposal, award document(s), progress reports, and correspondence with program officer.
- Prepare progress reports
 - quarterly/final reports
 - final close-out



- **Fiscal**

- Review negotiated budget from funder – grant agreement
- Institutional Budget
 - Director assigns FOAP & Grant Accountant
 - PD - submits a Banner Budget Upload
- Banner Budget
 - Monitor your spending
 - Ensure charges are allowable



Leading Grant Efforts

- Use the resources at AHC
 - Grant Summary
 - Grant team members
- Problem Identification
 - Spending - over/under spent
 - Gaps in personnel
 - Ineffective interventions – not meeting grant deliverables
 - Grant activities do not align with the Educational Master Plan



***BE PROACTIVE* - it takes time for a problem to develop and even more to address it.**

Identify Team Members

No one runs a grant program alone, know who's in your corner!

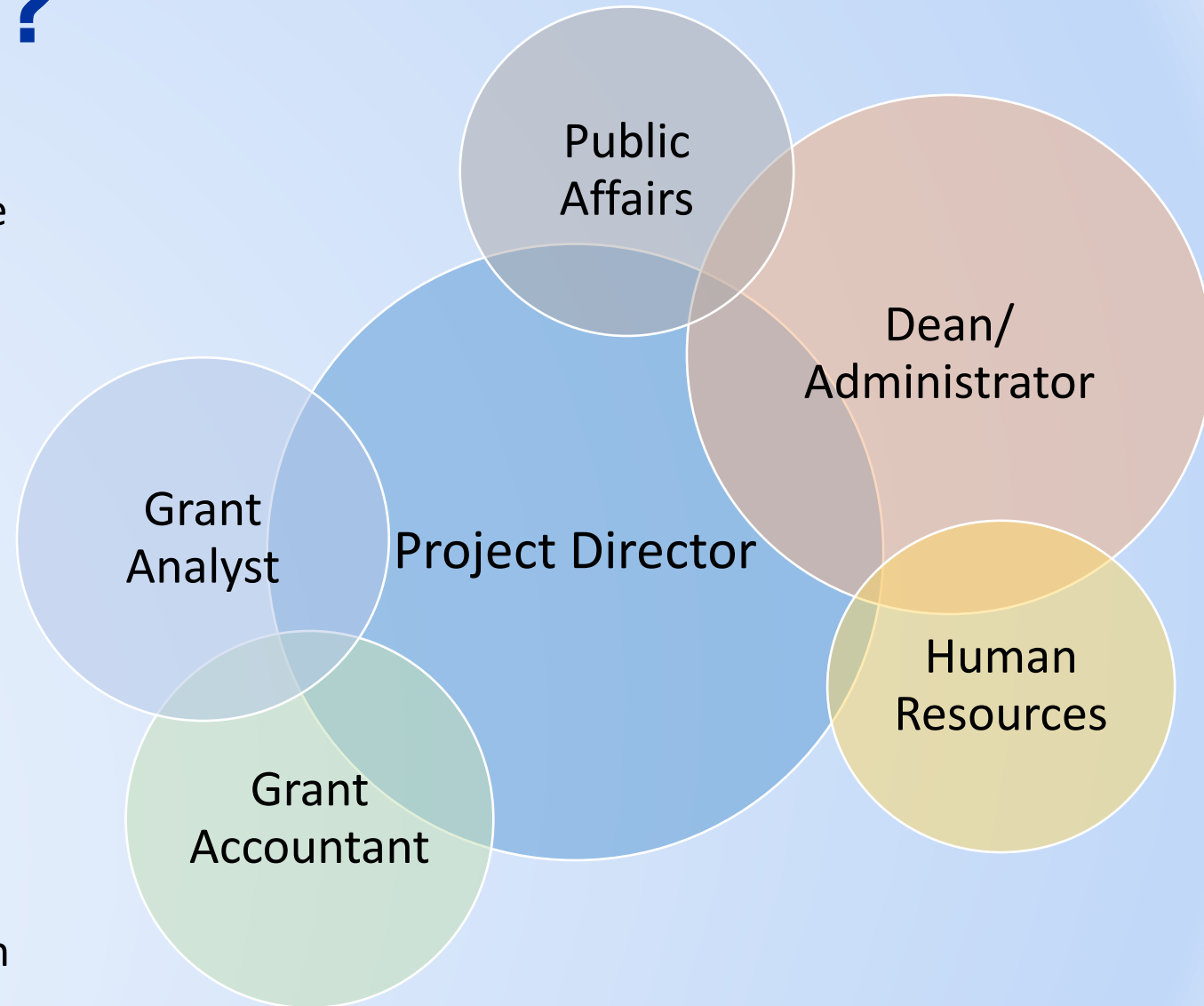
Who's on the Team?

- **Dean/Administrator**

- Ensure your program is integrated in the institution system and secure office space
- Checking in about any finance/budget issues for approval
- Include on communication to grant monitor
- Departmental support and communication

- **Grant Coordinators/Specialist**

- Managing day-to-day operations
- Data tracking
- Communication with partner and internal/external stakeholders
- Grant specific oversight/implementation



Have a question, want to make a change
or unsure what the next step is?

Public
Affairs

STOP!

**Don't contact the
monitor yet!**

Grant
Analyst

Grant
Accountant

man
resources

Check in with the AHC Grants Team before you
contact your funding agency/project monitor.

Two Sides of the Same Grant

Transparency and teamwork are crucial for the success of a grant project. From Pre to Post Award and Business Services to Institutional Grants.

The Grant Analyst & Accountant – work as a team. Each grant proposal will require we create a Microsoft Team to facilitate clear, consistent communication across campus.

This year we are working to improve utilization of TEAMS for Post-Award management to:

1. Improve problem identification
2. Facilitate resolution of grant related issues



Institutional Grants Office

- **Prepare & submit grant proposals**
 - New proposals
 - Renewal / reapplication
- **Inform/present to Shared Governance**
- **Engage with key staff to**
 - Maintain file of crucial project information
 - Resolve issues
 - Ensure compliance
- **Monitoring**
 - Assist with budget revisions
 - Help to create Banner Budget
 - Reminders & review of required reporting
 - Assist with data organizational systems / portals



From left to right: Mackenzie Greeley, Dr. LeeAnne McNulty, and Fern Robles

Business Services

- **Track spending trajectory**
- **Review charges to the grant are compliant - institutional and funder restrictions**
- **Banner Budget**
 - Each fiscal year the PD/PI will need to upload a new Banner Budget for upload
 - Check in about changes to the Banner budget and negotiated/grant budget
- **Reporting**
 - Fiscal reporting to funder – Quarterly & Annual



Michelle Evans
Interim, Director
of Business Services



Abraham Gonzalez
Grant Accountant



Jamie Zamudio
Grant Accountant

Thank you!

Please complete the survey by September 26th!

