



Award to Closeout

Grant Management in the Age of Compliance

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April 9, 2026

Audience Participation

Who has experience with grants from award to close out?

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What do you want to cover in this session?

Overview

What happens after the glow of the award wears off and it's time to get to work?

Topics this Session

- Organizational Meeting
- Negotiations with the Funder
- Pulling in Support: Partners, Subrecipients, Contractors
- Getting to work
- What happens when things go wrong (and they will)
- Closing out the grant

A few things to cover first

- This presentation is not legal, financial, or administrative advice.
- You are responsible for understanding how your grant requirements apply to your projects and organization.
- Different funder do different things
Grant agreements, reports, meetings, rules, databases, etc.
- Funders follow all the rules until they don't.
Always get it in writing when it's about following the rules or not.
- This presentation isn't going to cover everything that is important.
- If you didn't document it, it didn't happen

Organizational Meeting

Internal meeting of the people in your organization who will touch this grant funded project — project people, admin people, accounting and finance people — in order to review the proposal and plan for the work — most immediately negotiations with the funder and pulling in support.

What happens for a good meeting?

- ***Everyone*** reads the proposal, the notice of intent to award, and the grant agreement (if you have it) ***before you meet***.
- Open and honest conversation about the project, your capacity, and what is required to do the project AND manage the funding.
- Gather your questions and concerns for your first meeting with your funder

Negotiating with your funder

This is the meeting with your funder to establish the parameters of your grant agreement. Ask all of your questions, raise all of your concerns. At the end of this meeting, you should have clarity on the amount of funding, the required deliverables and the timeline... and any big considerations for how the grant agreement will be structures.

Important : A notice of intent to award is NOT a grant agreement. Your project timeline has NOT started. UNLESS specifically stated by the funder, you CANNOT begin expensing to the project (and yes, if they tell you otherwise, get that in writing).

Also important : After you sign a grant agreement and get started, it becomes increasingly more challenging to make changes to your budget, your timeline and your deliverables. In the negotiation phase is when you establish all the rules of the project—ask all of your questions, address all of your concerns.

Negotiating with your funder

Address ANYTHING that has changed between application and award

Establish clarity for

- Partners
- Timelines
- Staff
- Project Budget
- Cost share
- Other funders—make sure funders know about each other

Cost Share (Match)

- Understand the timeline required for your cost share
- Verify that your method of documentation works for your funder
- Make sure you have a good system for tracking match (You CANNOT double-dip on match)

Partner Work

Subrecipient

- If not in the original application, funder may want prior approval
- Requires a risk assessment that you perform
- You must monitor subrecipient performance (based on your risk assessment)
- If they fail, you fail
- If your agreement is greater than \$30,000 you must upload details in Sam.gov within 30 days of signing the agreement

Contractors

- Require a competitive, cost sensitive procurement process
- You must document your process
- Check what documentation is required for contract invoices

Everyone

- You must verify in Sam.gov that any entity, subrecipient or contractor, is not barred from receiving federal funding
- This is a specific search in Sam.gov using their UEI and you must save your search findings.
- What applies to you for compliance, applies to them— think BABA or Davis Bacon, etc.



Get to Work

As focus shifts to the actual work and project people focus on project activities, good grant management must continue.

Your grant agreement is your source of truth

What need to still happen in Grant Management?

- Monitor expenses for allowable costs, especially if one project has multiple funding streams from different entities.
- Communicate with your funder—successes as well as challenges
- Complete Report ON TIME—program and financial
- Monitor your subrecipients and contractors for compliance and performance
(remember, if they fail you fail)
- Celebrate Wins!
- Take Pictures

When Things Don't Go as Planned (this will happen)

Every project has something that fails, changes, doesn't go as planned, doesn't happen, doesn't work. You need to understand the scale of these changes and what to do.

Small scale stuff

- Changes of less than 10% of your budget by category
- Changes to internal timelines that don't impact the overall timeline
- Staffing changes involving individuals with minor roles in your project

Usually small stuff is an FYI for your funders in your regular communications, meetings, emails

Large scale stuff

- Changes of more than 10% of your budget by category
- Significant changes to your project timeline and deliverables
- Staffing changes involving individuals with major roles in your project

Changes may require amendments or other official actions

Notify your funder immediately when you become aware of these changes, work with your funder to incorporate changes official into your project plan and grant agreements

Close out time!

This is the formal close out of the grant agreement when you have reached the end of your project timeline and budget, and have completed all your project tasks and accomplished your grant deliverables (or your amended timeline, budget, and deliverables)

What do you need to do?

- Check your grant agreement for close out instructions
- Communicate closely with your funder during this time
- Make sure you understand allowable final wrap up costs (some funders allow grant funding to be spent on final reporting and wrap up after project period ends).
- Make sure you get all necessary work products and documentation from subrecipients and contractors.
- Submit final reports
- Document record keeping protocols that are consistent with grant agreement
- Thank your funder, participants, and partners
- Celebrate!

Let's Keep Talking!

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