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Grant Management Terminology

A

Acknowledgement – A letter or communication sent by FAM recognizing and thanking a constituent for their contribution. The constituent uses this to claim credit on their taxes.

Accrual Accounting – The accounting method used by FAM to recognize revenue when it is earned, rather than when payment is received.

Accrual Date – The date revenue is recognized in Financial Edge under the accrual method of accounting. At FAM, this is when the pledge letter, grant contract, or award notification is received by Development.

ALN (Assistance Listing Number) – The identifying number assigned to a federal assistance program.

Amendment – A formal change to an executed grant agreement or contract.

Application Timeline – The method a funder uses to accept applications. Options are either on a rolling or dated deadline.

Approved Budget – The budget accepted by the funder and included in the grant agreement.

Audit – An independent review of financial records and processes to ensure compliance with accounting standards and funding requirements.

Authorized Representative – The individual authorized to sign grant agreements and other official documents on behalf of FAM. At FAM, this is the Executive Director.

Award – A funding opportunity that has been approved for support.

Award Brief – The internal document that serves as the primary reference for managing an awarded grant or sponsorship.

Award Meeting -- Internal meeting held before signing an agreement or contract to review responsibilities, reporting requirements, budgets, and compliance expectations.

B

Budget – A financial plan that outlines the estimated income and expenses for a project, grant, sponsorship, campaign, or program. A budget identifies how funds will be allocated to complete approved activities and serves as the basis for financial tracking, reporting, and compliance.

Budget Narrative – A written explanation describing how requested grant funds will be used.

C

Cash Match – Cash contributed by FAM or another organization to satisfy a grant's matching requirement.

Close Date – The HubSpot property that records the date a Deal is expected to close or, for awarded grants, the date the agreement becomes active.

Closeout – The final stage of a grant after all reporting, payments, and required deliverables have been completed.

Compliance – Meeting all financial, contractual, reporting, and program requirements established by a funding agreement.

Constituent – Any individual or organization that has a relationship with FAM, including donors, funders, sponsors, members, volunteers, government agencies, foundations, businesses, and community partners.

Contributed Revenue – Financial support received through grants, donations, pledges, sponsorships, memberships, and other charitable contributions.

Contract – The legally binding agreement between FAM and a funder outlining the terms and conditions of an award.

Correspondence – Written communication related to a funding opportunity, including emails, letters, notices, and official communications.

D

Deadline – The published date by which an application or report must be submitted.

Deal – The HubSpot record used to track a specific fundraising opportunity or contribution.

Deal Owner – The Development staff member responsible for maintaining a Deal in HubSpot.

Deal Stage – The status of a Deal within its Pipeline.

Deliverables – The products, services, activities, or outcomes FAM agrees to complete under a funding agreement.

Department Beneficiary – The FAM department responsible for the project or program receiving funding.

Drawdown – A request for reimbursement submitted to receive funds from a reimbursable grant.

E

Evaluation – The process of measuring whether a funded project achieved its intended outcomes.

F

Financial Edge – The financial management system used to record revenue, receivables, budgets, and accounting transactions.

Financial Report – A report documenting how awarded funds were spent.

Foundation – A nonprofit organization that provides charitable funding through grants.

Fund – The funding classification assigned to a Deal. Funds are designated as **Restricted** or **Unrestricted**.

Funder – The organization that is providing financial support through a grant or sponsorship.

Funding Opportunity – A grant, sponsorship, or other funding program available for application.

Fundraising Campaign – An organized fundraising effort used to group and track related contributions.

G

Giving Category – The subject area or areas supported by a contribution, such as Programming, STEM, Tourism, or Environment.

Government Grant – Funding provided by a federal, state, or local government agency.

Grant – Financial support awarded by an external organization to carry out a specific project or purpose.

Grant Calendar – The Outlook calendar used to track application deadlines, reporting deadlines, and other grant requirements.

Grant Code – The unique identifier assigned to each grant application.
(GTXXX00)

Grant Coordinator – The Development staff member responsible for coordinating grant applications, documentation, reporting, compliance, and records.

Grant Folder – The SharePoint folder containing all records related to a specific grant.

Grant ID – Standardized naming convention used to identify grant applications across HubSpot, SharePoint, and Financial Edge.

Grant Lifecycle – The complete process of managing a grant from discovery through closeout.

Grant Management – The process of administering grants from opportunity identification through closeout.

Grant Reporting – The process of preparing and submitting required financial and narrative reports to a funder.

Grantor – Another term for Funder.

I

In-Kind Match – Goods, services, volunteer time, or other non-cash contributions used to satisfy a grant's matching requirement.

Indirect Costs – Administrative and operational costs that support a project but are not directly tied to a specific grant activity.

Internal Deadline – A deadline established by Development before the funder's due date to allow time for review and approvals.

L

Letter of Intent (LOI) – A preliminary application submitted before a full proposal when required by the funder.

Lump Sum Payment – Funding received in a single payment.

M

Match – A funding requirement that requires FAM or another contributor to provide financial or in-kind support toward a project.

Match Amount – The total value of the required match.

Match Constituent – The person or organization providing funding or resources toward a grant's match requirement.

N

Narrative – The written portion of a grant application or report.

Narrative Report – A report describing project activities, accomplishments, and outcomes during the reporting period.

Notice of Award (NOA) – The official notification that a grant has been approved for funding.

P

Payment Plan – The expected schedule for receiving funds. Options include **Lump Sum**, **Reimbursable**, **Annual**, and **Monthly**.

Performance Measures – The metrics used to evaluate the success of a funded project.

Pipeline – The HubSpot workflow used to track a Deal from beginning to completion.

Project – The FAM program, initiative, or activity supported by funding.

Project Lead – The staff member responsible for implementing a funded project and providing program information for reporting.

Proposal – The complete application submitted to a funder.

R

Receivable – Revenue that has been awarded but has not yet been received.

Record Retention – Requirement to maintain records for the period established by policy or the funding agreement.

Reimbursable Grant – A grant in which FAM pays eligible expenses first and then requests reimbursement.

Restricted Funds – Funds that must be used only for the purpose described by the funder.

Revenue Code – The accounting classification used to identify the type of contributed revenue.

Rolling Application – An application that may be submitted throughout the funder's open application period.

S

SAM.gov – The federal registration system where FAM maintains its organizational registration for federal funding opportunities.

Scope of Work – The activities, services, and deliverables FAM agrees to complete under a funding agreement.

SharePoint – Document management system used to store grant, sponsorship, and Development records.

Single Audit – The federal audit required when FAM expends the applicable federal threshold in federal awards during a fiscal year.

Source of Truth – The official document or system relied upon as the authoritative record for a project or funding agreement.

Subrecipient – An organization that receives grant funds through another organization rather than directly from the original funder.

Supporting Documentation – Records that verify grant activities or expenditures, including invoices, receipts, contracts, reports, timesheets, and correspondence.

U

UEI (Unique Entity Identifier) – The federal identification number assigned to FAM for federal grant applications and awards.

Uniform Guidance – The federal regulations governing the administration of federal grants, codified in 2 CFR Part 200.

Unrestricted Funds – Funds that may be used to support FAM general operations and are not limited to a specific purpose.

V

Version Control – The practice of maintaining current documents while preserving previous versions when revisions are made.

10.061 Grants

Purpose, Scope, and Definitions

This policy establishes the framework for the management of grants at FAM. It ensures compliance with federal, state, foundation, and corporate requirements while supporting fiscal accountability and transparency across departments. The scope of this policy applies to all staff engaged in grant scoping, application, award management, reporting, and closeout. For the purposes of this document, “grant” refers to any award of funds to FAM from an external source that requires a formal application, contract, and reporting a process.

For policies regarding Donations and Pledges (10.062) Membership (10.063), or Sponsorships (3.064), please refer to their corresponding sections.

Roles and Responsibilities

Grant management is a shared responsibility involving multiple departments. The Executive Director serves as the Authorized Representative with authority to sign agreements, amendments, and budget revisions. The Grant Coordinator, housed within the Institutional Advancement division, is responsible for maintaining Awards Meeting documentation, creating and distributing deadline communications, managing filing, and submitting reports and applications. Project Leads may come from any department or division, and are responsible for implementation of grant activities, submitting narrative reports, and ensuring compliance with program deliverables. Communications ensure all publicity complies with branding standards, and IT manages permissions, security, and backups for all digital files.

The Finance Department is responsible for coding expenditures, preparing financial reports, and monitoring federal thresholds for audit purposes. Accounts Receivable issues invoices, tracks payments, and provides receivables reports. Accounts Payable monitors payments through restricted accounts and provides payables reports.

Federal Grants and Single Audit Eligibility

FAM tracks federal grant awards in accordance with the Uniform Guidance. Each award is logged with its ALN number in Financial Edge. FAM is subject to the federal Single Audit requirement when total federal expenditures meet or exceed \$1,000,000 within a single fiscal year. To prepare for this threshold, Finance must ensure that expenditures are properly coded and reported. Finance reviews grant activity on a quarterly basis. If eligibility is met, FAM will coordinate with auditors to complete the audit and submit the required reporting package to the Federal Audit Clearinghouse.

SAM.gov Entity Registration and UEI Number

Annually, the Grant Coordinator must renew the institutional SAM.gov Registration. The annual deadline falls in December. This renewal establishes the institutional UEI number required on all federal grant applications.

Authorized Representatives

Grants often require an Authorized Representative signature for the finalization of grant contracts and other agreements. For the purposes of these contracts, the Executive Director is the sole Authorized Representative eligible for signature. For this reason, all contracts should be signed in advance of their deadline to ensure that the signature is collected on time.

Awards Meetings

The Grants Coordinator organizes an Awards Meeting using the approved Awards Meeting document template to begin the lifecycle for a new grant contract. The purpose of this meeting is to review award details, establish budget codes, identify reporting requirements, clarify roles and responsibilities, and ensure that all parties understand compliance expectations. The Awards Meeting serves as the formal starting point of the grant lifecycle and ensures that the Executive Director approves of all added grant-related responsibilities before the contract is signed.

Awards Meeting Document

The Awards Meeting document captures essential information and serves as a reporting guide and source of truth. Information collected includes award details, project coding, budget allocations, financial tracking, reporting requirements, IT access, procurement procedures, communications expectations, and record retention policies.

Signatures

After collecting signatures by the Project Lead, Finance Lead, Institutional Advancement Lead, and Communications Lead, the Executive Director reviews and signs the document. After review, the Executive Director signs the grant contract as an *Authorized Representative*. If the grant requires a physical signature, the Grant Coordinator delivers the signed contract to the grantor. If the signature is digital (ie through DocuSign) the Executive Director will provide the Grant Coordinator with a copy of the signed document.

Amendments to the Awards Meeting Document

Amendments to the Awards Meeting document are tracked in a log at the bottom of the template. Amendments are marked with the date of the amendment and the initials of the person who made the amendment.

Record Retention

FAM is committed to maintaining comprehensive records for all grants in compliance with Federal, State, and local requirements. All grant-related records are retained for a minimum of seven (7) years from the date of the final expenditure report submitted to the awarding agency or pass-through entity. Physical documentation must include, but is not limited to:

- *Signed agreements and wet signature pages.*

Physical storage of grant files is managed by the Grant Coordinator. The physical folders follow the same Grant ID naming convention as their match in the Financial Edge database. The files are organized in alphabetical order.

Digital documentation must include, but is not limited to:

- *Grant applications and drafts*
- *Contracts and amendments*
- *Scans of agreements and signature pages*
- *Correspondence with the grantor*
- *Financial reports, reimbursement requests, and supporting invoices*
- *Programmatic performance reports and evaluations*

Records must be maintained with appropriate access controls to safeguard personally identifiable information and other sensitive data as required by the Uniform Guidance (§200.302 and §200.303). When grants involve federal funding, additional record retention requirements may apply, including site visits, desk reviews, or audits. FAM staff are responsible for ensuring records remain complete and accessible for the full retention period.

Procurement and Competitive Bids

All procurement made with grant funds must comply with the procurement policy outlined in the grant. All procurement records, including bids, justifications, and contracts, must be retained in the grant file for audit purposes.

Allowable Costs and Documentation of Time

Costs charged to grants must be necessary, reasonable, allocable to the specific project, and allowable under both the grant agreement and the policies of FAM. Allowable costs and their corresponding codes are provided in the budget of the Awards Meeting document. Personnel costs must be supported by approved timesheets signed by both the employee and supervisor. Other costs, including travel, supplies, and contracted services must comply with grant-specific requirements.

Cost Share and Match Tracking

All required match contributions must be identified in the Awards Meeting document and budgeted within Financial Edge. Match commitments, whether in cash or in-kind must be documented and reported in compliance with the funders requirements. The Grant Coordinator monitors match reporting throughout the lifecycle of the grant.

Indirect Costs and Administrative Budget Support

FAM seeks to budget indirect costs at a rate of fifteen percent (15%) of total direct project costs whenever permitted by the funder. When funder restrictions limit indirect costs, FAM complies with those restrictions. Indirect cost recovery supports administrative overhead, compliance functions, and institutional sustainability.

Grant Onboarding

Grants with approved contracts are enrolled in Financial Edge by the Grant Coordinator upon receipt of the fully signed Awards Meeting document. The Awards Meeting document provides information for related fields within the Grant record in Financial Edge. A link to this grant record is made available in the correspondence to all leads. Correspondence templates are made available in the Grants Sharepoint.

Grant Reporting

FAM is committed to timely, accurate, and complete reporting for all grant funded projects. All reports follow the requirements set forth by the funding agency, as well as internal FAM standards and deadlines. Reporting requirements are recorded in the Awards Document upon activation of the signed grant agreement. Reporting occurs on a quarterly basis unless otherwise specified by the grantor.

- Responsibilities
 - Project Lead: preparing narrative and programmatic updates.
 - Finance: preparing financial expenditure reports.
 - Communications: preparing media and publicity deliverables, if applicable.
 - Grant Coordinator: compiling and submitting all required reports on time.
- Report Content
 - Narrative updates on progress towards goals and milestones
 - Financial reports detailing expenditures and budget alignment
 - Account distribution reports
 - Attendance/demographic data, if required
 - Media/publicity deliverables
 - Evaluation/survey results
 - Any additional compliance reporting required by the grantor

Submitting Grant Reports

All internal reports must be submitted by all signed leads using the dynamic online form provided by the Grant Coordinator. Specific grant requirements are detailed in the Awards Meeting document associated with the grant.

Information will be collected by the Grant Coordinator from the internal form. Only the Grant Coordinator may submit official reports to the funder, and all inquiries or correspondence regarding information, reporting, and the grant contract must include the Grant Coordinator.

Communications and Brand Compliance

Grant applications are not required to be reviewed by the Communications team before submission. FAM does not engage in advertising or endorsement of companies. Acknowledgement of support is limited to the display of the grantor's logo, official title, and a brief description. All communication and publicity materials must be reviewed by Communications before release and retained in the grant file.

IT and Data Access

All grant-related digital records are maintained in the Grant Management SharePoint under a standardized folders structure. IT provisions access on a least-privilege basis, ensuring only necessary staff can view or edit grant records. Regular backups are maintained, and all sensitive information is protected according to institutional data security policies.

Grant ID Naming Criteria

Grant IDs are assigned using a standard naming convention to ensure consistency and clarity. Grant IDs are created by the Grant Coordinator (IA) and coded in Financial Edge. A grant ID is assigned to all grant applications, regardless of whether the grant is awarded.

- **Prefix:** GT (Grant)
- **ID Structure:** First three letters of the granting institution. If FAM is a subrecipient, the sub-award manager will be used in place of the granting institution.
- **Number Structure:** A number is assigned to the grant which represents the number of applications attempted by FAM.
- Examples:
 - ARPA is the granting institution. Accenture is the sub-award manager:
GTACC01
 - We apply annually for funds from Express Employment. This is the third year in a row : **GTEXP03**

Grant Revenue Accrual Accounting

Revenue from grants is recorded as accrued on the date of the signed contract. In lieu of a signed contract, the date of the award letter serves as the date of recorded revenue. Until all payments have been fulfilled as per the grant contract, the total sum of the award is accounted for as a receivable. To ensure this is accurately coded in Financial Edge, Accounts Receivable creates an invoice for each expected payment after the conclusion of the Awards Meeting.

Notification of Grant Payments

It is important that Accounts Receivable is knowledgeable and aware of all grant payments receivable so they may be accurately accounted in Financial Edge.

- Lump-Sum: Grant contracts that deliver the awarded funding in one payment.
- Reimbursable: Grant contracts that offer drawdowns on a balance on reimbursement terms. FAM must spend the money first and then submit receipts or proof of payment to receive portions of the granted money over a period.

When grant payments are received, they are distributed as a Restricted Contract/Grant Receivable (2-1115-12), and applied to the existing invoice created upon the activation of the grant contract. Receivable queries are made available to the Grant Coordinator, and weekly grant receivable reports are sent to the Grant Coordinator on Monday mornings at 9:00am for review. The Grant Coordinator then records the payment in the deal record in Hubspot and sends an acknowledgement of funds received to the grantor.

Grant Closeout

The closeout process ensures that all activities are completed, and records finalized at the end of the grant term. The Grant Coordinator confirms submission of final narrative and financial reports, verifies match documentation, reconciles budgets, and ensures all payments are received. Files are archived in both digital and physical storage, and the grant is marked as “inactive” in Financial Edge.

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Grant Intake Procedure

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Pre-Award

1. **Create or designate a constituent grant folder** for the application. All grant folders are stored under the funder name in the [REDACTED] *Access Files: Grant Management > Documents > Grants*
2. **Create a new folder** and rename it to the Grant ID using **standard naming convention**.
 - o **Prefix:** GT (Grant)
 - o **ID Structure:** First three letters of the granting institution. If FAM is a subrecipient, the sub-award manager will be used in place of the granting institution.
 - o **Number Structure:** A number is assigned to the grant which represents the number of applications attempted by FAM.
 - o Examples:
 - i. ARPA is the granting institution. Accenture is the sub-award manager:
GTACC01
 - ii. We apply annually for funds from Express Employment. This is the third year in a row : **GTEXP03**

Review the record retention policy below for all contracts:

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Record Retention

FAM is committed to maintaining comprehensive records for all grants in compliance with Federal, State, and local requirements. All grant-related records are retained for a minimum of seven (7) years from the date of the final expenditure report submitted to the awarding agency or pass-through entity. Physical documentation must include, but is not limited to:

- *Signed agreements and wet signature pages.*

Physical storage of grant files is managed by the Grant Coordinator. The physical folders follow the same Grant ID naming convention as their match in the Financial Edge database. The files are organized in alphabetical order.

Digital documentation must include, but is not limited to:

- *Grant applications and drafts*
- *Contracts and amendments*
- *Scans of agreements and signature pages*
- *Correspondence with the grantor*
- *Financial reports, reimbursement requests, and supporting invoices*
- *Programmatic performance reports and evaluations*

Records must be maintained with appropriate access controls to safeguard personally identifiable information and other sensitive data as required by the Uniform Guidance (§200.302 and §200.303). When grants involve federal funding, additional record retention requirements may apply, including site visits, desk reviews, or audits. FAM staff are responsible for ensuring records remain complete and accessible for the full retention period.

3. **Create a Hubspot deal**, contact, and company for the application. Copy the link to the Grant ID folder and paste it in the “Sharepoint Folder” property. Log the date you started the application and the deadline in the Hubspot property, as well as the Grant ID. If a project has already been designated for the grant, choose that property.
4. **Copy the application template:** In the Grant ID Sharepoint Folder, copy this application template: 
5. **Name the application file** using the standard naming convention:
 - o *YY.MM.DD_GTXXX00_Application_Draft*
6. **Transfer all information** from the grant application over to this document. **Never write grant applications within the portal or website itself.** FAM must retain a copy of all that is submitted in our own document.
7. **Write or copy/paste the application questions** into the form, and write your responses in the boxes. Do not forget to log character/word count as you write.

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8. **Invite others to the document:** You may share or tag portions of the document with others to get their input. Always include Kerrie in the application for final review before submission.
9. **Gather signatures:** If signatures are required, please review the following policy:

Authorized Representatives

Grants often require an Authorized Representative signature for the finalization of grant contracts and other agreements. For the purposes of these contracts, the Executive Director is the sole Authorized Representative eligible for signature. For this reason, all contracts should be signed in advance of their deadline to ensure that the signature is collected on time.

10. **Review the application** and save a copy of your responses from the funder portal.
11. **Submit the application** and immediately write a thank you-correspondence to the funding officer to confirm they have received the application. Save a copy of the submission page to a PDF,
12. **Log the submission date** in the Hubspot deal.

Post-Award

Awards Meetings

The Grants Coordinator organizes an Awards Meeting using the approved [REDACTED] [REDACTED] begin the lifecycle for a new grant contract. The purpose of this meeting is to review award details, establish budget codes, identify reporting requirements, clarify roles and responsibilities, and ensure that all parties understand compliance expectations. The Awards Meeting serves as the formal starting point of the grant lifecycle and ensures that the Executive Director approves of all added grant-related responsibilities before the contract is signed.

Awards Meeting Document

The Awards Meeting document captures essential information and serves as a reporting guide and source of truth. Information collected includes award details, project coding, budget allocations, financial tracking, reporting requirements, IT access, procurement procedures, communications expectations, and record retention policies.

Signatures

After collecting signatures by the Project Lead, Finance Lead, Institutional Advancement Lead, and Communications Lead, the Executive Director reviews and signs the document. After review, the Executive Director signs the grant contract as an *Authorized Representative*. If the grant contract requires a physical signature, the Grant Coordinator delivers the signed contract to the grantor. If the signature is digital (ie through DocuSign) the Executive Director will provide the Grant Coordinator with a copy of the signed document.

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Amendments to the Awards Meeting Document

Amendments to the Awards Meeting document are tracked in a log at the bottom of the template. Amendments are marked with the date of the amendment and the initials of the person who made the amendment.

DO NOT SIGN OR SUBMIT THE CONTRACT UNTIL AFTER THE AWARDS MEETING.

1. **Copy the Awards Meeting template** into the Grant ID folder. Name it using the date it was created. YY.MM.DD_GTXXX00_Awards Meeting_Draft
2. **Save any correspondence as PDF** into the Grant ID Folder. Name is using the date it was received. YY.MM.DD_GTXXX00_Award Correspondence
3. **Prepare the awards meeting document** with all relevant information and send it to all signatories using the [REDACTED] Print a copy for each attendee. Print a copy of any contracts or required signatures for the Authorized Representatives to sign after the conclusion of the meeting.
4. **Schedule the meeting.** At the meeting, review all reporting requirements and gather signatures.
5. **Scan the signed document** into the Grant ID folder. Name it using the date of signatures. YY.MM.DD_GTXXX00_Awards Meeting_SIGNED. Send a copy to all signatories and remind them in the email of the first reporting date. This will prompt Finance to set up the grant in Financial Edge.
6. **Submit the signed contracts to the funder.**
7. **Add all reporting deadlines to the Grant Management calendar.** Invite all Awards Meeting attendees.

Reporting

Grant Reporting

FAM is committed to timely, accurate, and complete reporting for all grant funded projects. All reports follow the requirements set forth by the funding agency, as well as internal FAM standards and deadlines. Reporting requirements are recorded in the Awards Document upon activation of the signed grant agreement. Reporting occurs on a quarterly basis unless otherwise specified by the grantor.

- Responsibilities
 - o Project Lead: preparing narrative and programmatic updates.
 - o Finance: preparing financial expenditure reports.
 - o Communications: preparing media and publicity deliverables, if applicable.
 - o Grant Coordinator: compiling and submitting all required reports on time.
- Report Content

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- o Narrative updates on progress towards goals and milestones
- o Financial reports detailing expenditures and budget alignment
- o Account distribution reports
- o Attendance/demographic data, if required
- o Media/publicity deliverables
- o Evaluation/survey results
- o Any additional compliance reporting required by the grantor

Submitting Grant Reports

All internal reports must be submitted by all signed leads using the [REDACTED] provided by the Grant Coordinator. Specific grant requirements are detailed in the Awards Meeting document associated with the grant.

Information will be collected by the Grant Coordinator from the internal form. **Only the Grant Coordinator may submit official reports to the funder**, and all inquiries or correspondence regarding information, reporting, and the grant contract must include the Grant Coordinator.

1. **Update the Hubspot Deal** to enter the reporting stage.
2. **Copy the [REDACTED]** into the Grant ID Folder. It follows the same structure as an application.
3. **Name the reporting file** using the standard naming convention:
 - a. *YY.MM.DD_GTXXX00_Report_Draft*
4. **Transfer all information** from the report over to this document. **Never write grant reports within the portal or website itself.** FAM must retain a copy of all that is submitted in our own document.
5. **Write or copy/paste the report questions** into the form, and write your responses in the boxes. Do not forget to log character/word count as you write.
6. **Invite others to the document:** You may share or tag portions of the document with others to get their input. Always include Kerrie in the application for final review before submission.
7. **Gather signatures:** If signatures are required, please review the authorized signatures policy.
8. **Review the application** and save a copy of your responses from the funder portal.
9. **Submit the application** and immediately write a thank you-correspondence to the funding officer to confirm they have received the application. Save a copy of the submission page to a PDF,
10. **Log the submission date** in the Hubspot deal.

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Close

Grant Closeout

The closeout process ensures that all activities are completed, and records finalized at the end of the grant term. The Grant Coordinator confirms submission of final narrative and financial reports, verifies match documentation, reconciles budgets, and ensures all payments are received. Files are archived in both digital and physical storage, and the grant is marked as “inactive” in Financial Edge.

Process TBD

Good afternoon!

I am happy to report that we are ready to hold our awards meeting to go over the requirements to fulfill reporting and compliance for our (GRANTOR NAME) grant in the amount of (AMOUNT) for (PROJECT).

This meeting should not take more than 30 minutes. The purpose is to provide clarity and commitment from all necessary parties.

Please see the attached Awards Meeting Companion. We will review the document page-by-page, with room for questions and discussion for how to fulfill certain requirements.

To keep the meetings short, I would ask that you review this document before our meeting. I would like to follow an agenda alongside the document:

Award Overview and General Information: **5 minutes**

Finance and Accounting: **5 minutes**

Reporting: **10 minutes**

IT Requirements and Access: **5 minutes**

Contract, Signatures, and Deposit Information: **5 minutes**

Kindly,

Date of Award Meeting
FAM Staff in Attendance

Award Information

Grant Name / Title

Internal Project Lead and Department

Internal Grant Contact

Funder/Grantor

Grantor Contact Information

Pronouns / Salutation

Name

Title

Street Address

City, State, Zip

Email

Phone Number

Award Amount

Date of Notification

Grant Term / Duration

Match Name / Amount

Project Information

PROJECT CODE:

PROJECT BUDGET:

AWARD % OF PROJECT BUDGET:

PROJECT BUDGET ITEMS COVERED BY GRANT:

Department	Expense Code	Description	Amount
		Total	\$

1. Will the FY budget need to be adjusted to accommodate this grant contract?

☐

Yes

☐

No

2. If yes, who will submit the form?

DESCRIPTION

MILESTONES AND DATES

1. Do new dates need to be added to the institutional calendar to accommodate this grant contract?

2.

☐

Yes

☐

No

3.a. If yes, who will add the dates?

Finance and Accounting

Grant Code _____

Project Code _____

Accrual Audit Date Earned (Date of Contract) _____

Deposit Bank Account # _____

Deposit Type ☐ Reimbursement ☐ Lump Sum ☐ Purchase Order

Restricted/ Unrestricted _____

Revenue Code _____

Department Code _____

Example: xx-xxxx-xx

Total Federal Funds: _____

Allowable Expense Codes

Example: xx-xxxx-xx

Expected Deposit Dates

FY 2026	Q1	
	Q2	
	Q3	
	Q4	
FY2027	Q1	
	Q2	
	Q3	
	Q4	
Year 3	Q1	
	Q2	
	Q3	
	Q4	
Year 4	Q1	
	Q2	
	Q3	
	Q4	

Expected Expenditure Dates

Year 1 FY2026	Q1	
	Q2	
	Q3	
	Q4	
Year 2	Q1	
	Q2	
	Q3	
	Q4	
Year 3	Q1	
	Q2	
	Q3	
	Q4	
Year 4	Q1	
	Q2	
	Q3	
	Q4	

Does this expenditure timeline include any costs or contracts that exceed \$10,000? If so, how will competitive bids be made, tracked, and accounted for?

Reporting

Reporting Schedule

☐ Monthly

☐ Quarterly

*Per the Executive Director, all Project Leads must submit a quarterly project report per grant to the Grant Coordinator, with narrative, financial, and grant-specific updates outlined in this document. **The quarterly reports are due on the last Monday of every quarter following the contract date.***

Specific Reporting Deadlines

Year 1 FY26	Q1	
	Q2	
	Q3	
	Q4	
Year 2 FY26	Q1	
	Q2	
	Q3	
	Q4	
Year 3	Q1	
	Q2	
	Q3	
	Q4	
Year 4	Q1	
	Q2	
	Q3	
	Q4	

Report Requirements

Please submit all quarterly reports using the reporting form located in the Development intranet folder based on the questions provided in the form below.

☐ Narrative Report

Frequency Quarterly

Provided by (Title) Project Lead

Submitted by (Title) Grant Coordinator

Details

☐ Financial Report

Frequency Quarterly

Provided by (Title) Project Lead

Submitted by (Title) Grant Coordinator

Details

☐ Account Distribution Report

Frequency Quarterly

Provided by (Title) Finance Lead

Submitted by (Title) Grant Coordinator

Details

☐ **Media / Publicity Deliverables**

Frequency Quarterly

Provided by (Title) Comms Lead

Submitted by (Title) Grant Coordinator

Standard Comms Requirements:

☐ Logos on Website

☐ Press Release

☐ Logo on promo

☐ Legislative Updates

☐ Photos

Details

☐ **Attendance / Demographic Data**

Frequency Quarterly

Provided by (Title) Project Lead
Grant Coordinator

Submitted by (Title) _____

Details

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☐ Evaluation / Survey Results

Frequency Quarterly

Provided by (Title) Project Lead

Submitted by (Title) Grant Coordinator

Details

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☐

Other Compliance Reporting

Frequency Quarterly

Provided by (Title) Project Lead

Submitted by (Title) Grant Coordinator

Details

IT Requirements and Access

Grant File Path Grant Management Sharepoint -> GRANTS ->

Core Documents / Location

Contract	
Project Budget	
Application	
Logos	

Document Retention Policy

FAM is committed to maintaining comprehensive records related to all procurement transactions in compliance with Federal, State, and local laws. We retain records for a minimum of seven (7) years from the date of the final expenditure report submitted to the awarding agency or pass-through entity, ensuring documentation includes procurement history, rationale for methods of procurement, selection of contract type, contractor selection or rejection, wet signature pages, and the basis for the contract price. These records must be stored in both digital and physical formats, with access controls in place to safeguard protected personally identifiable information and sensitive data as required by §200.303 and §200.302 of the Uniform Guidance.

Approval Signatures

Executive Director _____ on _____

Director, IA _____ on _____

Project Lead _____ on _____

Comms Lead _____ on _____

Director, Finance _____ on _____

Grants Coordinator _____ on _____

Addendum A: Reimbursement Guidelines

What expenses are reimbursable under this grant?

What documentation is required for reimbursement? (paid invoices, proof of payment, timesheets, etc)

Where are reimbursement requests sent?

☐ Mailed to

☐ Emailed to

☐ Portal Link

Reimbursement Frequency

☐ Monthly

☐ Quarterly

☐ Per Project Milestone

☐ Other:

First Request Due:

Recurring Timeline:

Addendum B: Purchase Order (PO) Setup

Is a PO Required for grant-funded purchases?

☐

Yes

☐

No

☐

Unsure

Who initiated or will initiate the PO? (Title) _____

Where are POs sent?

☐

Mailed to

☐

Emailed to

☐

Portal Link

PO Number (If already assigned) _____

Supporting documentation required with PO:

Is the PO set up to draw from a specific line item or vendor list?

☐

Yes

☐

No

If yes, list restrictions

Are there any vendor registration or pre-approval requirements?

☐

Yes

☐

No

If yes, list restrictions

An E-Verify or Background Check must be performed for all subcontractors.

Expected timeline for PO setup and approval:

CONTRACT REVIEW

Completed by: Date of Review:

PROJECT DELIVERABLES

1.

GRANTEE DELIVERABLES

1.

RECORD AND RETENTION

1. Is there a record and retention plan required?

YES

NO

2. For how long are records required to be retained?

3. How are record required to be retained? (ie physically, digitally, etc)

4. Will there ever be a site visit / desk review for file retention?

COMMUNICATIONS AND PR

Standard Comms Requirements:

Logos on Website
Press Release
Logo on promo

Legislative Updates
Photos

1. What are the communications requirements, if beyond the scope of standard comms requirements?

2. Is there a budget for communications / marketing baked within this grant project? If not, is it in the project budget?

3. If there is no budget, how will marketing/communications funds be attributed?

BUDGET REVISIONS PROCESS

- 1.

OTHER CONSIDERATIONS

SUBJECT: (Grant Code) Post-Award

Hello all,

Please find attached the signed and modified version of the [REDACTED] for our grant (Grant Name) (Grant Code). All signatures have been obtained, and the contract was signed on (Date of Signature).

The awards document includes all reporting requirements, next steps, and finance information.

Reporting dates have been added to the Grants Management Calendar. The project, grant, and vendor have been set up in Financial Edge. The contract has been uploaded in the Executive contract folder.

Designated Roles

- Project Lead:
- Communications Lead:
- Finance Lead:

LINKS:

The reporting form can be found at this link and within the calendar invite: (link to form)

Grant Folder: (Link to Grant Folder)

ALL ATTACHMENTS, COMMS DETAILS, LOGOS ETC ARE IN THIS FOLDER.

Thank you all, please let me know if you have any questions.

Kindly,

[FUNDER NAME] [GRANT ID]

Due Date:	Amount:	Method of Submission:
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Funder History

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Report Questions:

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Character/Word Limit:

Character/Word Count:

Good afternoon!

This is a reminder that you have an upcoming report for the grant (Name of Grant) (Grant Code) due on (internal deadline).

For your reference, here is the link to the Standard Grant Reporting Form: (insert link)

All questions to be answered in the report can be found in the following Award Briefing: (insert link)

Additional documents to be updated and/or completed are listed below.

1. Name of Document (Link to document)
2. Name of Document (Link to document)

Please submit the grant reporting form by (internal deadline).

Thank you