



GREATER NEW ORLEANS FOUNDATION

Post award reporting and financial
management training | 2025



Welcome and introductions



Introductions

Who is in the room

- GNOF Staff
Who: Alyssa and Dan
Role: Your main point of contact for the grant opportunity
- ISC Staff
Who: Rachelle and Cora
Role: Your main point of contact for technical assistance



Alyssa Quaranta



Dan Favre



Rachelle Sanderson



Cora Martin

Community Advisory Board

Lanor Curole

Former Tribal
Administrator, United
Houma Nation



Todd Reynolds

Executive Director,
Groundwork New
Orleans



Angela Chalk, DHA

Executive Director,
Healthy Community
Services



Greater New Orleans Foundation

Mission: To drive positive impact through philanthropy, leadership, and action in the Greater New Orleans region.

Vision: A vibrant, sustainable, and just region for all.



Institute for Sustainable Communities

Mission: Our mission is to develop practical, lasting solutions that address environmental, economic, and safety challenges while strengthening communities in the U.S. and across the world.



Introductions

Who is in the room

- Tell us a bit about yourself
- Poll
 - Are you planning to apply?
 - Have you received a federal grant in the past?
 - Have you taken a training on federal grant financial management or reporting?
 - Did you attend the first training on pre-award financial management and reporting?



Community-Led Green Infrastructure Grant

Funding Opportunity



- Application is open through October 24, 2025
- You must fill your application out on Foundant Grants Portal
- There are three funding stages:
 - **Stage 1 Community-Led Design & Planning, Award Amount: \$50,000 (6 awards)**
 - Purpose: Support for planning, community engagement, feasibility assessments, and conceptual designs for community-led green infrastructure projects. Design and planning awards are only available for Round 1.
 - **Stage 2 Community-Owned Implementation, Award Amount: \$150,000 (1-3 awards)**
 - Purpose: Support the implementation of community-led green infrastructure projects addressing stormwater, resilience, and pollution issues.
 - **Stage 3: Community Evaluation & Storytelling, Award Amount: \$62,500 (1-3 awards)**
 - Purpose: Support the community-led evaluation, storytelling, and communication efforts that capture lessons learned and impact of existing community-led green infrastructure projects.
- Applicants may only apply for one grant per round. The Round 2 Request for Applications is expected to be open in fall of 2026. Round 1 total funding available is up to \$1 million, and a total of \$1.75 million will be distributed over both rounds.



Who this training is for

Our audience

- This free training is for people who:
 - Haven't applied for a federal grant
 - Don't have experience in being the lead on a grant
 - Aren't familiar with grant reporting and financial management
 - Haven't taken training on these topics
- This training may seem repetitive or feel boring if:
 - You have taken grant reporting and financial management trainings
 - You have applied for a federal grant
 - You have applied for more than 5 grants





Federal grant compliance

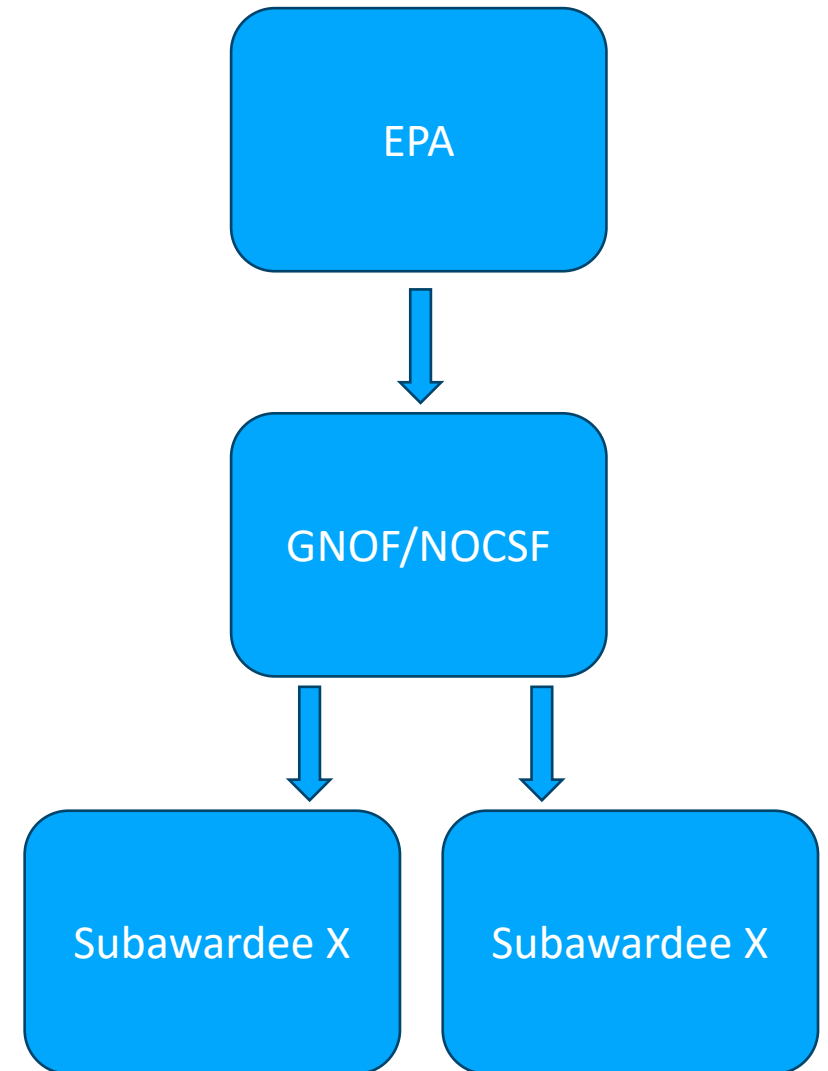
What to know after you receive an award



Wait... this is a federal grant?

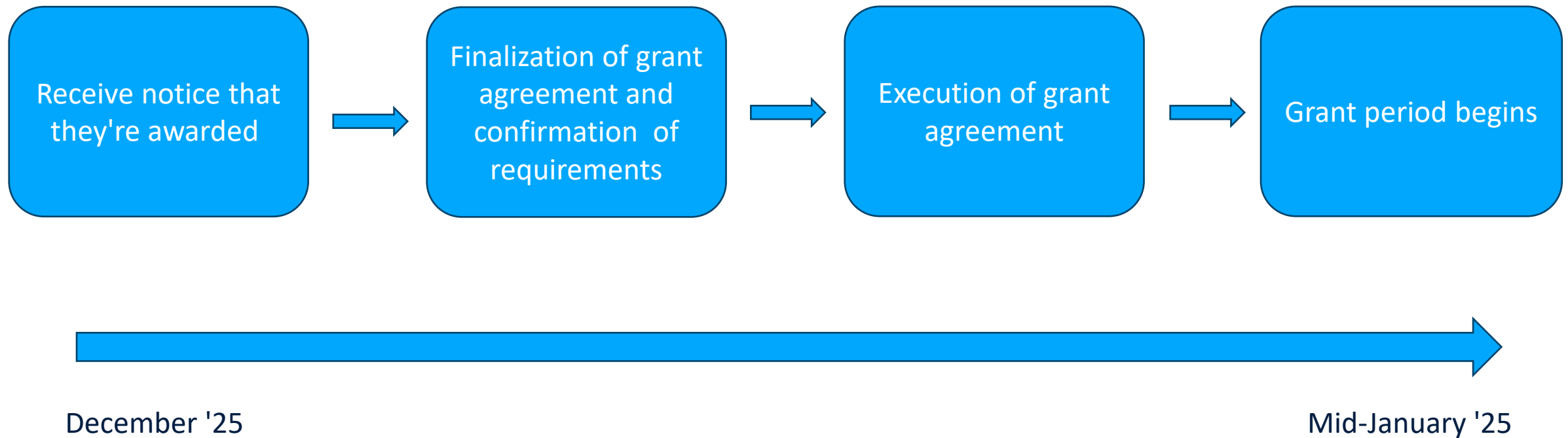
Explaining the relationship as a subawardee

- The New Orleans Community Support Foundation (NOCSF), a supporting organization of the Greater New Orleans Foundation received a grant from EPA to disburse grants to community-based organizations through a competitive process
- This means that you'll need to comply with Federal reporting guidelines and regulations
- The following training and materials are based on EPA regulations and training materials



Award process

How does this work



***Timeline is subject to change**

Sources

Regulations terms and conditions

- [CFR Part 200](#) - Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards
- [2 CFR 1500](#) - Uniform Grants Guidance, additional regulations specific to EPA
- [EPA General Terms and Conditions](#)
- Grant specific terms and conditions - reflected on the official assistance award document. This is what you'll sign with NOCSF/GNOF



What you'll need to do after you receive an award

A checklist

- ☐ Maintain relevant documentation
- ☐ Negotiate terms and budget
- ☐ Review and update policies for compliance if needed
- ☐ Hire and onboard key partners
- ☐ Hire/assign key personnel
- ☐ Comply with all rules and regulations including:
 - ☐ Paperwork reduction act
 - ☐ Procurement
 - ☐ Conflict of interest
 - ☐ Budget and charging to the grant

Compliance

Maintain Relevant Documentation

Maintain the following through an organized file storage and sharing system:

- Grant application, work plan, and all accompanying documents
- Grant agreement
- Federal Financial Reports and progress reports
- Payment requests with supporting documentation
- Any changes to the award agreement or other written approvals
- Purchase records for project equipment, supplies, materials, or services
- Information about contracts, subawards, and payments to program beneficiaries
- Records of correspondence with the grantor
- *Financial records, supporting documents, and all other records pertinent to a federal award must be retained for a minimum of 3 years from the date the final Federal Financial Report is submitted unless an audit or other review requires that the records be maintained for a longer period.*
- [Tip: Review EPA Grants Management Training for Applicants and Recipients, Module 5](#)



Admin

Negotiation, subaward and contracts

- Review terms and agreements and ensure you are required to meet all conditions prior to accepting. Send any comments or requests for revisions and request a meeting to review award terms and to discuss any questions with your program officer
- Read your award agreement carefully and review key program and budget related sections. Make note of any significant concerns, questions, or mistakes in the grant agreement, including the terms and conditions
- [Develop subaward agreements and contracts \(template here\)](#)



Subaward Contract Sample

Sub-Recipient Agreement

This Sub-recipient Agreement ("Agreement") is by and between **Organization Name**, hereinafter referred to as "**XYZ**", and **Subgrantee Name** ("subgrantee"), and is effective **Month Day, Year**.

Background

XYZ desires to retain Subgrantee to support in **geography** for the implementation of the USDA grant to offer nutrition incentives to SNAP recipients through participating Subcontractor **stores and farmers markets**, (the "Project"); and Subgrantee represents that it has the personnel with technical expertise, experience, and knowledge to perform such work for **XYZ**.

Agreement

Compliance

Conflict of interest

- [EPA General Terms and Conditions: #23 Disclosing Conflict of Interest](#)
 - Disclose any COI to your program officer within 30 days of the discovery.
 - Have systems in place to address, resolve and disclose to COIs (apply to recipients and subrecipients).
 - Upon notice from the recipient of a potential COI and the approach for resolving it, the Agency will then make a determination regarding the effectiveness of these measures within 30 days of receipt of the recipient's notice.
- [Tip: Review EPA's Financial Assistance COI Policy](#)



EPA's Financial Assistance Conflict of Interest Policy

EPA's Final Financial Assistance Conflict of Interest Policy (applicable October 1, 2015)

As required by Title 2 of the Code of Federal Regulations, section 200.112, EPA has established a Final Financial Assistance Conflict of Interest Policy governing disclosure of actual and potential conflicts of interest by applicants for, and recipients

Compliance

Budget – charging to the grant

- Create a process/system for maintaining documents if you don't have one already
- As required by 2 CFR 200.302(b)(3), costs incurred under a grant must be supported by “source documentation,” such as invoices, receipts, bills, online transaction confirmations, selection memo and other items.
- In addition to recording financial transactions in your organization’s accounting system, you must maintain records that support those transactions. The supporting information should be cross-referenced to accounting entries and maintained in a filing system.
- You must identify records by using the appropriate EPA account numbers to ensure that grant costs are charged to the correct EPA grant.
- Recipients must maintain timesheets or other reliable documentation that supports actual payroll charges and contracts, contractor bills that support contract costs, payment requests from subrecipients, and documentation of stipends paid to training program participants.
- [Source: EPA Grants Management Training for Applicants and Recipients, Module 2](#)

Compliance

Procurement

- Subawards: Are for the purpose of carrying out a portion of a Federal award and creates a Federal assistance relationship with the subrecipient.
 - Has its performance measured in relation to whether objectives of a Federal program were met.
 - Is responsible for adherence to applicable Federal program requirements specified in the Federal award
- Contracts: Are for the purpose of obtaining goods and services for the non-Federal entity's own use and creates a procurement relationship with the contractor. Per 2 CFR 200.331, contractors (including individual consultants) typically:
 - Provide goods and services on commercial terms.
 - Provide similar goods and services to many different purchasers.
 - Operate in a competitive environment; and a reasonable profit is allowable.
- [See: EPA Subaward Policy Appendix A: Distinctions Between Subrecipients and Contractors](#)
- [Tip: Find more details in the Procurement, Subawards, and Participant Support Costs EPA webinar. See: 2 CFR 200.331 Subrecipient and contractor determinations](#)



Procurement

Methods

- Micro-purchase (\$10,000 or less) - may be made without competition provided the recipient distributes purchases equitably among qualified suppliers to the extent “practicable” and the prices are reasonable.
- Small purchase (\$250,000 or less) - obtaining price or rate quotations from an adequate number of qualified sources. Obtain quotes/prices from at least 3 sources.
- Purchases above simplified acquisition threshold \$250,000 - recipients must either advertise for sealed bids or publicly solicit competitive proposals. Note: These are minimum guidelines set by the regulations. Your organization’s policies and procedures can be stricter.
- **Your application cannot name a specific contractor unless you have a sole source justification**
 - If under \$250k The justification must be a written document demonstrating that only one supplier can provide the required product or service, or that other limited circumstances apply, such as an emergency or inadequate competition after solicitation
 - If over \$250k it needs to be approved by the funding agency



Admin

Hiring people

- Consider who will take on which tasks, who is already on your staff and hiring new personnel
- [Tips for hiring people](#)
- [Sample per diem policies](#)
- [Sample payroll policy](#)

InsideNGO

Sample Per Diem & Travel Policies

A compilation of member shared policies.



Admin

Policies

- As a part of your award, you will need to have the following organizational policies in place. Some of these policies can support your organization regardless of receiving a Federal award (see links for templates – be sure to make copies instead of editing directly).
 - [Procurement policy](#)
 - [Participant cost policy](#)
 - [Allowable costs policy](#)
 - [Drawdown policy](#)
 - [Subaward policy](#)
 - [Travel policy](#)
 - [Consultant and professional services policy](#)
 - [Per diem policies](#)
 - [Sample payroll policy](#)





Reporting

Reporting

Guidance and compliance

- Check the terms and conditions of your grant agreement and the work plan for specifics on reporting frequency/due dates and what to include in the progress reports
- Final progress report will be required once the grant is completed
- Coordinate with your contact at GNOF on templates for progress reports. GNOF will have quarterly report where they will share some of the findings and highlights from your report
- Check due dates in your notice of award
- Review and understand payment terms and obligations

Specific to this grant

Reporting

- Grantees will be required to submit quarterly reports. Grantees will be asked to report on some, or all, of the following items:
 - Summary of work completed for the quarter, including a description and a place to drop or attach photos if available.
 - Results of key program and project metrics. Metrics will include those required by EPA, which may not apply to all projects, as well as metrics determined in collaboration with the Foundation's program evaluation team. Examples could include:
 - Number of individuals reached through environmental education methods.
 - Number of individuals engaged through project-specific community engagement efforts.
 - Number of designs, plans, timelines, and cost estimates created (design and planning grants only).
 - Number of gallons of stormwater capacity created (implementation grants only).
 - Number of presentations delivered (evaluation and storytelling grants only).

Specific to this grant

Reporting continued

- Schedule and budget update.
- Summary of issues, changes, and challenges encountered during the quarter.
- Description of top activities planned for the following quarter.
- Other topics as determined in the program evaluation plan and quarterly reporting template, which could include prompts like:
 - Success story or highlight from the quarter.
 - Optional quote from a community member or partner.
 - Summary of how the subawardee organization/team/community has developed or grown during the quarter and/or any technical assistance activities participated in.
 - Summary of community engagement efforts during the quarter.
- These quarterly reports will be used to inform GNOF's quarterly report to EPA





Let's discuss

Group Discussion

- We'll discuss
 - Concerns
 - Areas of confusion
 - Areas of opportunity
 - Needs for technical assistance as a potential grantees
- We'll come back as a full group and will discuss takeaways from breakout groups



How to receive technical assistance from the Institute for Sustainable Communities



INSTITUTE FOR
**Sustainable
Communities**



What is technical assistance?

Getting support for your application

- Technical assistance (TA) is support and guidance that is provided to support you with the development of your application. Examples include:
 - **Organizational readiness**
 - **UEI/Sam.gov registration support**
 - **Policy and procedures in alignment with federal standards and the Code of Federal Regulations**
- Application development
 - **Ideation/brainstorming for your application**
 - **Resources/guidance for technical aspects**
 - **Budget review**
 - **Application review for consistency with scoring criteria**
- What we **can't** do is write your application or budget for you



Opportunities for technical assistance (TA)

Virtual

- Introductory sessions (like this one)
 - **Purpose: Introduce the grant and tell you how to participate in TA**
- Virtual Office Hours
 - **Purpose: Weekly time to come and get support/listen to the support others are getting**
 - **Weekly on Mondays from 10:30 to 11:30 am**
- Virtual training sessions
 - **Purpose: Grow participants skills to support development of their application and set expectations for post-award requirements**
 - ~~Grant prospecting - Sept. 11 from 1 to 2:30 pm~~
 - ~~Grant writing - Sept. 15 from 1 to 2:30 pm~~
 - ~~Pre-award reporting and financial management - Sept. 30 from 10 to 11:30 am~~
 - **Post-award reporting and financial management - Oct. 6 from 12 to 1:30 pm**
- Virtual 1:1 session
 - **Purpose: Register in advance for tailored technical assistance**
 - **Six 30-minute 1:1 slots are available each week**



Opportunities for technical assistance (TA)

In person

- Six in-person sessions to provide an overview of the opportunity, key first steps for getting your application started and how you can get signed up for technical assistance. These are the dates and locations of in person sessions:
 - ~~Houma - Sept. 16 from 10 to 11:30 am~~
 - ~~Gretna - Sept. 17 from 10 to 11:30 am~~
 - ~~Amite - Sept. 23 from 1 to 2:30 pm~~
 - ~~New Orleans - Sept. 24 from 10 to 11:30 am~~
 - ~~Covington - Sept. 30 from 1 to 2:30 pm~~
 - ~~Reserve - Oct. 2 from 10 to 11:30 am~~
- Register for in person and virtual sessions with the QR code:





Questions

Quick survey

- We'll be using this information to inform design for TA throughout this program
- Your responses will not be shared beyond the project team



GREATER NEW ORLEANS FOUNDATION



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