



GREATER NEW ORLEANS FOUNDATION

Pre-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 financial management or 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

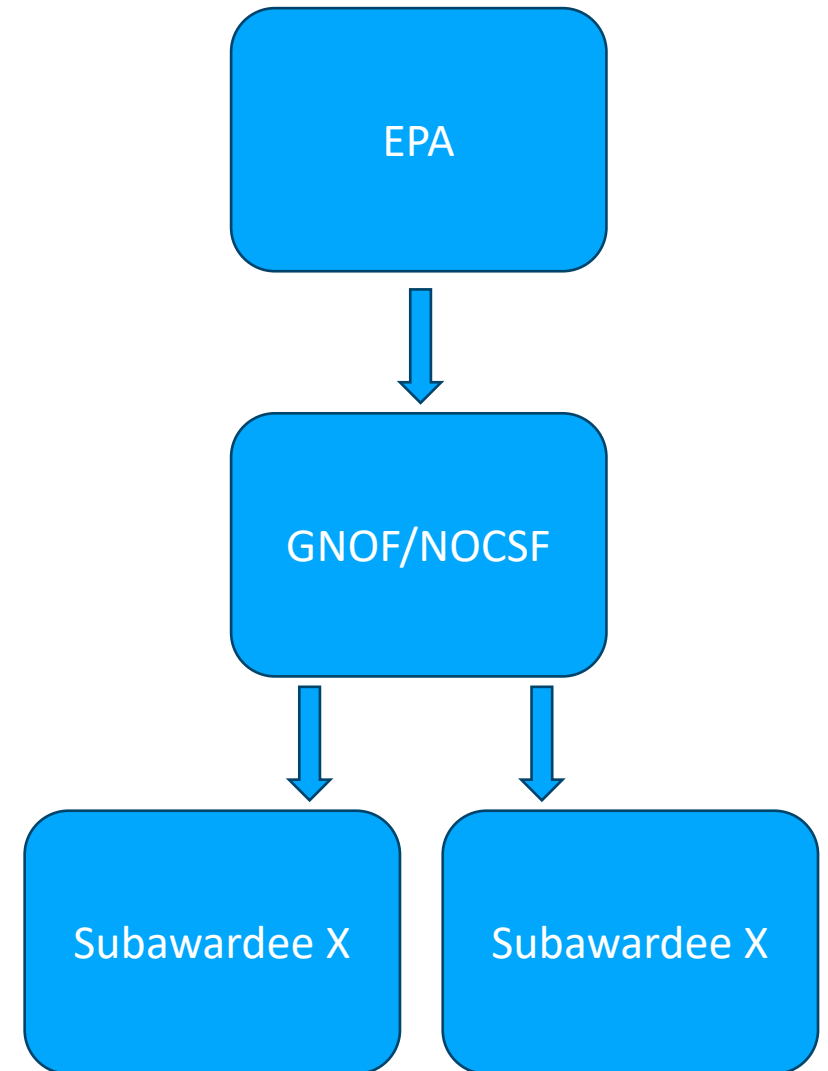
What to know before you receive an award



Wait... this is a federal grant?

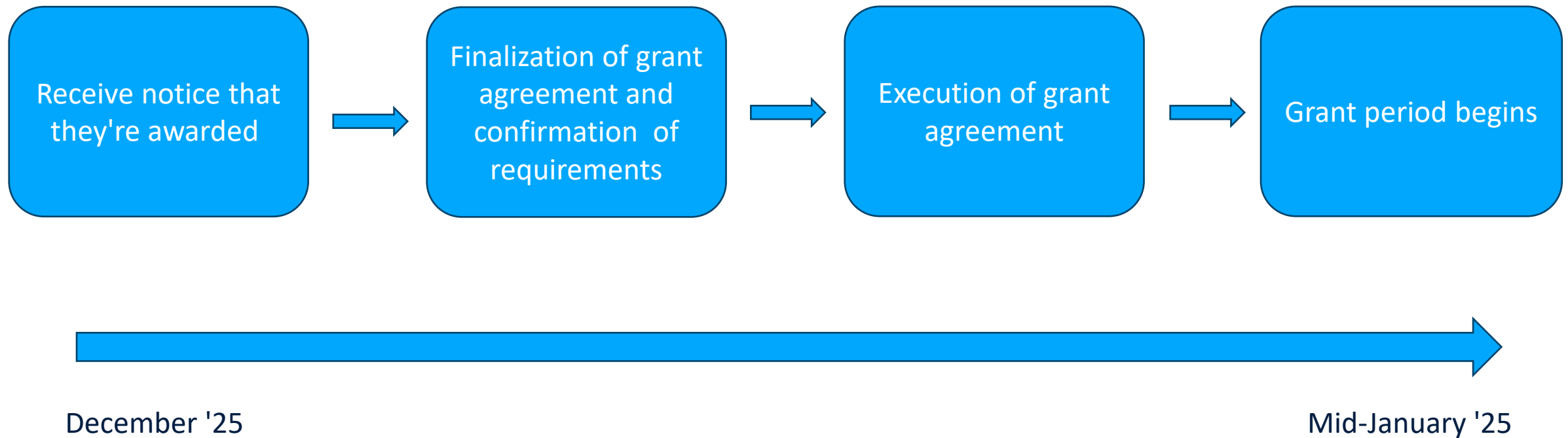
Explaining the relationship as a subawardee

- 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 prior to receiving an award

A checklist

- ☐ Ensure that your budget and activities are compliant with Federal regulations
- ☐ Review internal policies to see what may need to be altered prior to receiving a Federal award



What to consider when developing your budget



Budget

Line item

- Consider the high-level categories you report on to your funder and board in tandem with project costs. Each partner should have their own budget as well. For mileage, food, lodging, etc. Utilize federal per diem and mileage rates. You can utilize the [US General Services Administration for per diems](#) and the [IRS federal mileage rate](#)
- Below is an example:

Type	Category	Year 1	Total
Direct costs	Personnel	\$	\$
	Fringe	\$	\$
	Travel	\$	\$
	Equipment	\$	\$
	Supplies	\$	\$
	Contractual	\$	\$
	Construction	\$	\$
	Other	\$	\$
	Total direct	\$	\$
		\$	\$
	Total indirect	\$	\$
Total project		\$	\$

Direct vs indirect costs

- Direct costs - Costs that can be assigned to a specific budget category (wages, materials, supplies, travel, etc.)
Indirect costs - Costs that are not readily identifiable with a particular activity but are necessary to the general operation of the organization and the conduct of the proposed project (such as general administration expenses: accounting, HR, utilities, etc).
- Prior to drawing down EPA funds for indirect costs, recipients must have an approved rate and an EPA-approved budget that includes direct costs.
- To be allowable under a grant, indirect costs must be distributed to the grant and all other benefiting activities using a cost allocation process.
- Note: Each organization determines which costs are direct or indirect. Indirect costs rates are unique to each organization.



Cost principles

Terms

- **Allowable** - Costs necessary and reasonable for the performance of the grant that are consistent with the policies and procedures that apply uniformly to both EPA grant activities and other activities of an organization.
- **Reasonable** - A cost is reasonable if, in its nature and amount, it does not exceed that which would be incurred by a prudent person under the circumstances prevailing at the time the decision was made to incur the cost
- **Allocable** - the goods or services involved are chargeable or assignable to a cost objective in accordance with the relative benefits the grant receives.
- **Necessary** - for the performance of the Federal award
- **Adequately documented**
- [Tip: Check CFR 200 Subpart E Cost Principles for more details.](#)



Unallowable costs

Examples

- Advertising and PR not related to the project (200.421)
- Advisory Councils (200.422)
- Alcoholic Beverages (200.423)
- Bad Debts (200.426)
- Commencement and convocation (200.429)
- Contribution and Donations (200.434)
- Entertainment costs (200.438)
- Equipment without prior approval (200.439)
- Fines, penalties, damages (200.441)
- Fundraising and Investment costs (200.442)
- General cost of Governance (200.444)
- Good /services for personal use (200.445)
- Idle Facilities (200.446)
- Legal costs (200.435)
- Lobbying (200.450)
- Losses on other awards/contracts (200.451)
- Organization Costs (200.455)
- Selling and Marketing (200.467)
- Student Activity Cost (200.469)

These are some frequently occurring unallowable costs. This list is not meant to be all-inclusive, please review 2 CFR Part 200, Subpart E – “Cost Principles” when in doubt to obtain additional information.



Participant support costs

- Participant support costs include stipends paid to interns who are not employees of your organization, registration fees for community members attending conferences, and travel support for individuals who are not employees of your organization to enable them to participate in training, work groups, and research projects.
- Stipends are to individuals, not organizations. If it's an organization then it's a contract or sub grant
- You can give stipends for
 - Time spent participating
 - Meals
 - Travel



Participant support costs

- Participant support costs should be included as a separate line item under Other budget category in the recipients' budget narrative.
- Recipients must have program officer's approval to pay participant support costs before incurring this type of cost.
- Recipients must obtain prior program officer's approval for 35 post-award transfers of funds budgeted for participant support costs to other direct cost categories.
- ***Recipients must exclude participant support costs from their Modified Total Direct Cost base for the purposes of applying indirect cost rates.***
- Note: Each program has their own definition of who is a participant for that project. This should be clear and documented to ensure consistency in how its applied.



Consultants fee cap

- Consultant Cap EPA participation in the salary rate (excluding overhead) paid to individual consultants retained by recipients or by a recipient's contractors or subcontractors shall be limited to the maximum daily rate for a Level IV of the Executive Schedule, available [here](#), to be adjusted annually.
- This limit applies to consultation services of designated individuals with specialized skills who are paid at a daily or hourly rate. This rate does not include transportation and subsistence costs for travel performed (the recipient will pay these in accordance with their normal travel reimbursement practices). **The current cap is \$191,900 annually/\$735.6 daily/\$91.95 hourly**
- [Tip: Review EPA General Terms and Conditions \(Consultant Cap #7\)](#)



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



Travel costs


- Costs need to be reasonable, allocable, and allowable.
- Cover employee's trips that are necessary to perform the EPA agreement. Travel must be integral to the purpose of the proposed project (e.g., inspections) or related to proposed project activities (e.g., attendance at meetings or training courses).
- Should be normally allowed in like circumstances in an organization's non-federally funded activities and in accordance with written travel reinforcement policies.
- Under 2 CFR 200.475(d) allowable travel costs may not exceed the rates and amounts for Federal travel. Federal lodging and per diem rates are available [here](#).
- Make sure to record/track/document all travel expenses.
- EPA policy requires that all foreign travel must be approved by its Office of International and Tribal Affairs. Foreign travel includes trips to Mexico and Canada but does not include trips to Puerto Rico, the U.S. Territories or possessions.
- All foreign travel funded under must comply with the Fly America Act. All travel must be on U.S. air carriers certified.



Additional resources

- [EPA webinars](#)
- [EPA Grants policy resources](#)
- [EPA Grants Management Training for Applicants and Recipients](#)
- [EPA FAQ questions](#)
- [NGL Post-Award Toolkit](#)
- [TCTAC post-award toolkit](#)





What to consider as an organization



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](#)



Quantitative vs qualitative data

- Qualitative data focuses on "why" and "how" through descriptive data, is exploratory and can help develop hypotheses
 - Examples include: photos, stories,
 - Acquired by: interviews, focus groups, surveys
- Quantitative data focuses on "what" and "how much" with numerical data, is conclusive and can help confirm hypotheses
 - Examples include: counts, percentages, statistics
 - Acquired by: polls, experiments, close-surveys, statistical analysis
- Ideally you tell the story of your work with both. For example... through a grant that was given to a community-based organization for building upgrades they were able to upgrade their HVAC system leading to over \$500 in annual savings. This HVAC unit was described as sounding like a "freight train" when it turned on and often staff would turn it off when having meetings or would avoid meeting in their building during certain times of the year. Since the upgrade, they don't even notice the unit running because it's so quiet.



Measurement, evaluation and learning

- Consider how you'll report on your impacts
- [Draft data collection and quality assurance template](#)
- [Draft MEL framework template](#)
- *This template is not a part of your application
- There will be support in the community of practice for this element

Overview	
Service Name	
Program Purpose	
Ultimate Goal	

Context	
External Factor	
Political	
Funding	
Social	
Technological	
Environmental	
Legal	
Regional	
Community-specific	
Public/Media Perception	

Problem Statement	
Key Component	
Core Problem	
Root Causes	
Scope	
Barriers	



Data Collection

□ Consider data collection and quality assurance

- Data quality assurance template
- Data quality assurance resources

Data Collection Plan Template								
Measure (Linked to Data Source)	Operational Description	Data Type	Unit	Stratification Factors	Sampling Notes	Collection Methodology	Objective(s)	Activit(ies)
Example: Grant Fund Utilization	The total amount of grant funds spent, measured monthly, against project-specific budget line items such as staffing, equipment, and program delivery costs. This includes tracking direct and indirect expenses.	Continuous ▾	US Dollars (\$)	Project Phase (Planning, Implementation, Evaluation) Type of Expense (Operational, Administrative, Programmatic)	Monthly sampling of expenses from financial reports submitted by the project team. Sampling will focus on high-cost budget items and ensure proportional spending across project phases.	Expense reports submitted via [accounting software name] integrated with the toolkit's reporting feature. Regular audits by the project manager and financial team.	Ensure compliance with the grant's financial reporting requirements and avoid any discrepancies in fund utilization.	Quarterly Financial Reporting, Internal Audits, Expense Review Meetings
Example: Stakeholder Engagement Type	This measure tracks the types of engagement activities conducted with project stakeholders, such as community members, funders, or partners. Engagement is categorized into meetings, workshops, trainings, or surveys. Each type of engagement is recorded when the activity occurs and who participated.	Nominal ▾	Type of Engagement (Meeting, Workshop, Training, Survey)	Stakeholder Group (Community, Funder, Government), Engagement Frequency (Weekly, Monthly, Quarterly)	Data will be collected on all engagement activities occurring within each reporting period. Random sampling of qualitative feedback will be conducted from 10% of participants to assess the quality of engagement.	Data will be collected via event sign-in sheets, online participation records (for virtual meetings), and post-event surveys filled out by stakeholders. Each engagement type will be categorized during event documentation and entered into the project's data management system.	Ensure diverse and adequate stakeholder participation throughout the project lifecycle to meet grant requirements and build community trust. This measure also assesses whether sufficient outreach is occurring equitably across different groups.	Community Outreach Sessions, Grant Funder Update Meetings, Training Workshops for Local Partners





Let's discuss

Group Discussion

- We'll discuss
 - Concerns
 - Areas of confusion
 - Areas of opportunity
 - Needs for technical assistance related to the topics we've discussed
- 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



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