Administration for Community Living

Office of Healthcare Information and Counseling (OHIC)

National Conference

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Ask Us Anything: Grants Management & Policy FAQ Jam Session

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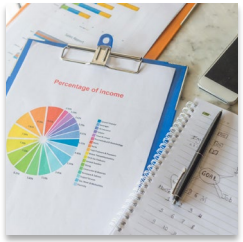
SHIP State Health Insurance Assistance Program

Navigating Medicare

SMP Senior Medicare Patrol

Preventing Medicare Fraud

Welcome & Overview



Budgeting and Costs

Covers allowable and unallowable costs, travel expenses, and managing budget structure revisions effectively.



Reporting and Amendments

Addresses reporting requirements, submitting amendments, and handling multi-grant cost allocation accurately.



Product Requirements and Compliance

Highlights required disclaimers, logos, and compliance essentials critical for successful grant management.



Open Discussion

Facilitates participant-driven questions, sharing of practical experiences, and collaborative exploration of grant management challenges.

Choose your Adventure



OR



Regulatory References

Key Guidance Documents

- 2 CFR Part 200 & 2 CFR Part 300 – Uniform Administrative Requirements, Cost Principles, Audit Requirements for Federal Awards (effective Oct 1, 2025)

- HHS Grants Policy Statement v2.0 (effective Oct 1, 2025)

Food or Meals

Allowed Food Purchases

Grant funds can be used to buy food for team members during training or allowable per diem and subsistence.

Food for Public Not Allowed

Purchasing food for the public, including snacks or candy for outreach incentives, is not permitted with grant funds.

Regulatory Guidance

Guidance is based on 2 CFR 200.432 Conferences, emphasizing discretion and judgment in managing conference and meal expenses.



Volunteer Travel Costs

Allowable Travel Costs

Volunteer travel costs must align with paid staff travel guidelines to be considered allowable expenses.

Reasonable and Necessary Expenses

Travel expenses must be reasonable, necessary, and justified under federal award guidelines.

Compliance with Regulations

All volunteer travel costs must comply with the written travel policies and federal regulation in 2 CFR 200.475 Travel Costs.

Outreach Items

Allowable Outreach Items

Outreach items must be relevant to the grant's purpose and reasonable in cost to qualify.

Timing and Usage

Items should be acquired early enough to be used during the grant award period.

Branding Requirements

All outreach items must display program details and national program logo for identification.



Which of these items is likely <u>not</u> allowable?

A. Pill case

B. Hand sanitizer

C. Pen

D. Umbrella

Shirts with Logos





Allowable Outreach Items

Shirts with program logos are allowable outreach items when aligned with grant purposes and costs are reasonable.

Purpose of Logo Shirts

Logo shirts help promote the program by increasing visibility during outreach and community events.



Vehicle Purchase or Lease



Allowable Vehicle Acquisition

Rental, lease, or purchase of vehicles may be approved on a case-by-case basis with proper justification.

Cost-Effectiveness Consideration

Grantees must evaluate cost-effectiveness before acquiring vehicles to ensure responsible use of funds.

Prior Written Approval

Obtaining prior written approval is mandatory before any vehicle or capital expenditure is made.

Allocation Across Grants

Time Charging Requirements

Staff must allocate work hours based on actual effort spent on each federal grant.

Methods of Cost Splitting

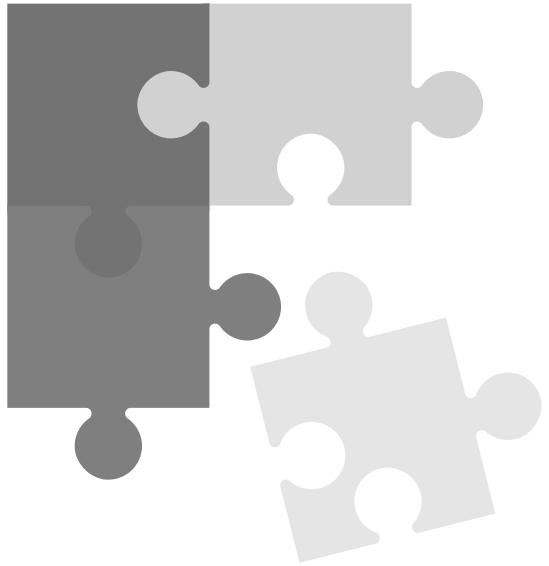
Shared costs can be divided evenly or proportionally based on staff time dedicated to each grant.

Importance of Documentation

Proper documentation and rationale must support cost splitting to ensure transparency and compliance.

Cost Allocation Principles

Costs must be proportionally allocated to grants reflecting the benefit derived by each.



Incentive Items

Allowable Incentive Items

Incentive items for volunteers and staff are allowed if costs are reasonable and comply with regulations.

Outreach Items as Incentives

Outreach items can serve as incentives if they meet the established outreach item guidelines.

Honoraria Restrictions

Honoraria are prohibited when intended primarily to confer honor or esteem rather than for compensation.



Budget Narratives

Project Director

- The PI/PD must be included in the budget narrative to detail their role and time commitment accurately.
- Listing the PI/PD ensures transparency and oversight even if their salary is not charged to the grant.

Matching Funds

- OHIC grants do not require matching funds, simplifying the application and funding process.
- If matching funds are included but not met, federal awards may be reduced or enforcement actions applied.

SF-425 Reporting



Budget Period Reporting Requirement

The SF-425 report must reflect all expenditures and balances cumulatively throughout the budget period, typically 12 months

Accurate Financial Tracking

Accurate tracking ensures compliance and proper management of federal award funds across the award's life.



Budget Revision Approval

Approval Requirements

Budget revisions need prior approval if they include scope changes or significant rebudgeting.

Subawards and Subcontracts

Changes to subawards or subcontracts require approval if not covered in the original budget.

Submission Procedure

All requests must be submitted through the GrantSolutions platform for formal approval.

Carryovers

- “First in, first out“
  - For example, if 2024 is the third year in a five-year grant and unobligated funds remain in years one (1) and two (2), the following applies:
    - Year 1 unobligated the funds can be carried over into year 3.
    - Year 2 unobligated funds can be carried over into year 3.
    - Year 1 and 2 funds should be exhausted before year 3 funds.

- Multiple carryover actions can be requested together.
  - List all unobligated amounts separately (per year) in the cover letter.
  - SF425 should reflect the cumulative total carryover amount being requested.

Logo Requirements

Mandatory Logo Usage

SHIP/SMP/MIPPA logos must be included on every product made or purchased using grant funds, ensuring consistent branding.

Applicability to Partners

Subrecipients and subcontractors are also required to display SHIP/SMP/MIPPA logos on relevant products and materials.

Disclaimer Requirements

- Subgrantees and contractors may use the same language as the grant recipient.
- When multiple grants fund a product, sum all award amounts for the total funding in the disclaimer.
- For multi-year grants, use the cumulative total of awards up to the product creation date.
- All products must display the disclaimer and logo for compliance and brand consistency.
  - Shortened disclaimers may be approved for very small items with prior consent from the OHIC Project Officer.

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