EGMS: Grant Lifecycle Timeline

Expectation Guides

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OBJECTIVE

- To ensure that state issued education grants are managed properly and that government funds are spent in accordance with applicable laws and regulations.

Grant Lifecycle Timeline

OSSE Actions

Pre-Award Phase

Applicant Actions

Award Phase

Post-Award Phase

Grant Lifecycle Timeline: Pre-Award Phase

OSSE Actions

Applicant Actions

Pre-Award Phase

Planning an Opportunity

Announcing an Opportunity

Registering on grants.osse.dc.gov

Viewing Funding Opportunities

Pre-Application Conference

Completing an Application

Retrieving the Application

Staying in the Loop

Finishing the Review Process

Grant Lifecycle Timeline: Pre-Award Phase

OSSE Actions

In the early stages of the grant process, OSSE plans and develops a funding program based on its mission, the Administration, and local initiatives

Pre-Award Phase

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Applicant Actions

Grant Lifecycle Timeline: Pre-Award Phase

OSSE Actions

Next, OSSE formally announces the funding opportunity, advertising it to applicant communities and inviting proposals tailored to address the program mission. The OSSE Program will publish details of the funding opportunity in the registrar.

Pre-Award Phase

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Applicant Actions

INDIRECT COST RATE PLANNING

This is the time to plan if your organization will be implementing an indirect cost rate for eligible grants.

LEA Indirect Cost

LEAs interested in an indirect cost rate will indicate so by emailing OGMC requesting the Indirect Cost Rate Proposal Template that must be completed and submitted for approval.

CBO Indirect Cost

Each year the Department of Education will inform OSSE if we are permitted to extend a provisional rate to CBOs. If a provisional rate is allowed information and guidance will be found on the EGMS landing page.

IHE Indirect Cost

IHEs must submit to OGMC a letter from Health and Human Services (HHS) detailing the authorization of an indirect cost rate.

Grant Lifecycle Timeline: Pre-Award Phase

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Applicant Actions

Organizations interested in applying to education grants distributed through OSSE will need to register with EGMS as a vendor.

See the TRAINING – User Guide – EGMS Credentials (found on the EGMS Login page).

Grant Lifecycle Timeline: Pre-Award Phase

OSSE Actions

Pre-Award Phase

Applicant Actions

Planning an Opportunity

Announcing an Opportunity

Registering on grants.osse.dc.gov

Viewing Funding Opportunities

Once registered as a vendor, potential applicants will access EGMS and view available grants for which they may apply. Applicants should also check the funding opportunity for additional requirements specified by the grant making agency.

Pre-Application Conference

See the TRAINING – User Guide – EGMS User Manual – EGMS Access/Select section (found on the EGMS Login page).

Completing an Application

Retrieving the Application

Staying in the Loop

Finishing the Review Process

Grant Lifecycle Timeline: Pre-Award Phase

OSSE Actions

Pre-Award Phase

Applicant Actions

Planning an Opportunity

Announcing an Opportunity

Registering on grants.osse.dc.gov

Viewing Funding Opportunities

OSSE schedules and executes a pre-application conference to inform potential applicants of regulations, the application process, and particularities of the grant.

Pre-Application Conference

Potential applicants are highly encouraged to attend pre-application conferences to become informed on target groups, regulations, and how to apply.

Completing an Application

Retrieving the Application

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Grant Lifecycle Timeline: Pre-Award Phase

OSSE Actions

Pre-Award Phase

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Applicant Actions

Completing a grant application can take weeks. All applicants must complete Central Data – Assurances prior to submission of an application. Some programs require Phase I Assurances to be submitted prior to the Phase II application.

EGMS has a "Save" function that allows users to save progress. Fields require everything from basic organizational information to explanations of proposed work and financial data. When an application package has been completed per the opportunity instructions and checked for errors, through the Consistency Check, it may be submitted by the Authorized Representative in EGMS.

See TRAINING – User Guide – EGMS User Manual :
- EGMS Access/Select section
- Central Data
- Completing a Funding Application

See TRAINING – User Guide – EXT SAM Expiration Date Certification.

Grant Lifecycle Timeline: Pre-Award Phase

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When an application has been submitted, the application is retrieved by OSSE and reviewed.
- Formula grants are reviewed by OSSE staff.
- Competitive grants are reviewed by readers.

Once an application has been submitted the grantor application processing begins. A submitted application may be reviewed from the Access / Select page but no edits may be saved once submitted.

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Applicant Actions

Applicants may track the status of their application by accessing the Review Summary which will indicate the date and individual to whom the application has been routed.

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Applicant Actions

As OSSE reviews applications, a range of program stakeholders will participate. The review process takes time and varies based on grant type. As the review process takes place, OSSE may update applicants on the status of their application.

Grant Lifecycle Timeline

OSSE Actions

Pre-Award Phase

Applicant Actions
Awardee Actions

Award Phase

Post-Award Phase

Grant Lifecycle Timeline: Award Phase

OSSE Actions

Awardee Actions

- Award Phase
- Notify the Award Recipient
- Post-Award Performance Conference (Reimbursement Training)
- Beginning the Hard Work
- Funding Management
- Updating Project Status

Grant Lifecycle Timeline: Award Phase

OSSE Actions

When the review process has been completed, OSSE notifies the applicants through EGMS whether or not they have been awarded a grant. Applicants that are awarded will have a status of "Final Approved" and (in most cases) EGMS will automatically generate the Grant Award Notification (GAN).

Award Phase

- Notify the Award Recipient
- Post-Award Performance Conference (Reimbursement Training)
- Beginning the Hard Work
- Funding Management
- Updating Project Status

Awardee Actions

The GAN is the official document that states the terms, conditions, and amount of an award. The document is formatted into numbered sections that provide information about the award, including administrative information, legislative and fiscal data, and names and phone numbers of project staff.

The GAN will also contain attachments which spell out additional terms and conditions of the award and enclosures that give further guidance on administrative procedures (e.g., where to submit reimbursement requests). The attachments and enclosures contain important information about the award and users are urged to pay particular attention to them as the GAN is reviewed.

The GAN is located electronically in EGMS under the status of the application.

Grant Lifecycle Timeline: Award Phase

OSSE Actions

Awardee Actions

Award Phase

Notify the Award Recipient

Post-Award Performance Conference
(Reimbursement Training)

Beginning the Hard Work

Funding Management

OSSE program schedules a Post-Award Performance Conference for award recipients.

Award recipients will attend training to understand expectations, the process of submitting reimbursement requests, and other tips for fiscal management of the award.

Receiving the Grant Award Notification symbolizes the beginning of a partnership between an organization and OSSE. The partnership process focuses on establishing and cultivating relationships with all grantees to promote and ensure successful project outcomes. This partnership is characterized by frequent and on-going communications between a grantee and the grant team throughout the life of the project. Grantees are encouraged to use their program office as a resource in attaining their project's goals and to obtain and use the contact information for their grant team for maximum communication.

The Post-Award Performance Conference is generally the first step in developing this relationship. This initial one-time discussion takes place shortly after a new grant is awarded, but usually not later than 90 days after the award date. The main focus of the meeting is to establish a mutual understanding of the specific outcomes that are expected and to establish measures for assessing the project's progress and results. Information on project outcomes is needed to ensure that the project achieves the objectives as stated in the application. The post-award performance conference also clarifies and lays the groundwork for monitoring practices and on-going communication between grantees and OSSE to ensure that a project's desired goals are achieved.

A conference can take many forms. It can be a face-to-face meeting, telephone discussion, workshop, electronic mail exchange, or notes sent via fax or mail. Furthermore, for some programs, the performance conference might involve entering into a performance agreement that specifies activities and milestones that is signed by both parties. Other grantees will be contacted in a reasonable amount of time after an award has been issued to discuss their project activities, expected outcomes, and project progress.

Grant Lifecycle Timeline: Award Phase

OSSE Actions

Awardee Actions

Award Phase

Notify the Award Recipient

Post-Award Performance Conference
(Reimbursement Training)

Beginning the Hard Work

Funding Management

Updating Project Status

After an applicant receives the Grant Award Notification (GAN) they will begin their project. The award recipient is responsible for meeting the administrative, financial, and programmatic reporting requirements of the award.

Grant Lifecycle Timeline: Award Phase

OSSE Actions

Award Phase

Awardee Actions

Notify the Award Recipient

Post-Award Performance Conference
(Reimbursement Training)

Beginning the Hard Work

During the award period the Grant Manager will review the award draw-down rate according to programmatic calendaring making regular check-ins to ensure concerns are resolved and projects on running on schedule.

Funding Management

Updating Project Status

EGMS provides end-users informative financial summaries that detail current-year and prior-year funds, draw down, and reimbursement request check/ACH information.

See TRAINING – EXT – Funding Summaries.

Grant Lifecycle Timeline: Award Phase

OSSE Actions

Award Phase

Notify the Award Recipient

Post-Award Performance Conference
(Reimbursement Training)

Beginning the Hard Work

Funding Management

Updating Project Status

Awardee Actions

During the year recipient's needs may change. In the case a sub-recipient needs change, recipients will use the AMEND button to update the scope and budget of the project.

See TRAINING – EXT – Creating an Amendment to an Application.

Grant Lifecycle Timeline

OSSE Actions

Pre-Award Phase

Awardee Actions

Award Phase

Post-Award Phase

Grant Lifecycle Timeline: Post-Award Phase

OSSE Actions

After a grant is awarded, a grants management officer at OSSE oversees an awardee's reporting compliance. This process extends across the life of the grant award and involves reviewing reports submitted by the awardees. Representatives from OSSE may perform on-site visits with the project director and implementation staff. Oversight may also occur in the form of auditing.

Post Award Phase

Providing Support and Oversight

Reporting Progress

Award Closeout

Awardee Actions

Grant Lifecycle Timeline: Post-Award Phase

OSSE Actions

Post Award Phase

Providing Support and Oversight

Reporting Progress

Award Closeout

Awardee Actions

Award recipients conduct two primary types of reporting to OSSE on a regular basis: financial reporting and programmatic reporting. These reports provide information about the overall financial status and program performance of the grant project.

See TRAINING – EXT – Monitoring LEA User Guide (select programs in EGMS).

Grant Lifecycle Timeline: Post-Award Phase

OSSE Actions

Post Award Phase

Providing Support and Oversight

Reporting Progress

Award Closeout

Awardee Actions

As reports and financial data are passed along to OSSE, the program stakeholders ensure that all requirements are being met. Upon completing all the closeout requirements, including a review of the final financial and technical reports from the awardee, the grant lifecycle comes to an end.

At the end of a grant year awardees will close all reimbursement requests and reconcile expenses.

See TRAINING – EXT – Closeout.

Resources

EMGS Help Desk:
(202) 719-6500
osse.callcenter@dc.gov