

IMPACT FUND GRANT PROGRAM

GRANT ADMINISTRATION GUIDE



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Introduction

The Larimer County Behavioral Health Services (“LCBHS”) Grants Administration Guide is designed to provide grantees with detailed and easy-to-access information about how to comply with grant requirements. All members of the grantee organization involved in the project's oversight and reporting should familiarize themselves with the following grant requirements for successful project completion, reporting, and associated payments.

About LCBHS Grant Funding

In 2018, voters approved a 20-year ballot initiative to commit funding for behavioral health purposes in Larimer County. As part of that initiative, the Impact Fund Grant Program was created to enrich community-based behavioral health services that address the needs of Larimer County community members with a commitment to the following funding priorities:

- Access & Affordability
- Care Coordination & System Integration
- Early Identification & Intervention
- Stigma Reduction & Public Awareness
- Quality Care
- Prevention

Grant Portal: SmartSimple

SmartSimple is the real-time web-based system that LCBHS uses for its grant application, management, and reporting processes. System-generated e-mails will be sent to the Primary Contact and will come from larimerimpactfund@smartsimple.com. Please ensure this email address is added as a contact so those automated emails do not go to the Spam folder.

Logging into SmartSimple

Log in using the link: larimerimpactfund.smartsimple.com to access your drafted and submitted proposal(s), active grants, closed grants, as well as any actions required for reporting.

Accounting

LCBHS grant funds are restricted program/project-specific dollars and should be tracked separately from other funds in your accounting software. You should not co-mingle these funds with general operating dollars.

Restricted grant dollars carry specific obligations or instructions relating to the use of the funds, and LCBHS funds are restricted to supporting the behavioral health needs of people living in Larimer County as well as the items outlined in your grant agreement. For detailed information, visit our webpage: <https://www.larimer.gov/behavioralhealth/impact-fund/post-award/accounting>

Reporting Requirements

Grantees are required to submit interim reports and a final evaluation report during the project period. A list of required reports and their due dates can be found on page one of the grant agreement. Reports are due 30 days after the end of the reporting period. Notification will be sent 60 days before it's due and made available in the online portal under "Actions Required" on your home dashboard.

Interim Reporting

1. **Narrative question(s)**
 - **Please explain any significant changes (either positive or negative) impacting this program/project*
 - *Optional: Is there anything you need from us right now to help you succeed?*
 - *Optional: Is there is anything else you would like to share?*
2. **Budget:** **Complete the expenditures-to-date in the table and describe the status of your expenses in more detail.*
3. **Objectives:** **Quantify the progress for each objective in the objective table and briefly elaborate on the progress made towards each objective.*
4. **Optional:** Upload any supplemental materials, photos, or supporting documentation

Final Reporting

For the most up-to-date information, please see our Post Award [Reporting](#) webpage for details. Each narrative question has a 500-word limit.

1. Narrative questions

- **What went well?*
- **What didn't go well and what did you learn?*
- **What specific outcomes were achieved? For Targeted Grants, how do these outcomes address the goal and/or strategies of the target area?*
- *Optional: If you were able to publicize information concerning the grant in the newsletters, annual reports, press releases, website and/or other relevant media we'd love to hear about it. Was LCBHS acknowledged? Why or why not?*
- *Optional: Do you have any compelling stories to share as a result of this grant?*

2. Budget: **Complete the expenditures-to-date in the table and describe the status of your expenses in more detail.*

**Upload a high-level Profit and Loss Statement for the current reporting period*

**Upload a financial system-generated General Ledger with transaction detail for the current reporting period*

Note: Financial Reports should be for BHS grant funding ONLY, not the entire organization [Financial Report P&L Example](#), [Financial Report P&L Transaction Support Example](#)

3. Objectives: **Quantify the progress for each objective in the objective table and briefly elaborate on the progress made towards each objective.*

**Elaborate on the progress made towards each objective over the course of the grant*

**Please upload supporting documentation for your objectives*

4. Demographic Data & Geographic Reach

**Did you provide specific outreach to one or more of the following? (check all that apply)*

- ☐ Fort Collins ☐ Loveland ☐ Estes Park ☐ Wellington ☐ Timnath
☐ Red Feather Lakes ☐ Laporte ☐ Berthoud ☐ Windsor ☐ Johnstown
☐ None

If you have demographic data on the populations you serve, upload it here

Population Data/Information, as applicable, about the targeted population reached (description, definition, counts, etc.) You can provide your own files or use this

[Demographic Data Reporting Template](#)

5. Other

Optional: Is there anything else you would like to share?

Optional: Upload any supplemental materials, including photos, white papers, brochures, press releases, media stories, and other products produced as a result of the grant.

Project Oversight

BHS staff regularly review Grantees' progress toward the project goals and objectives and incorporates evaluation into its grant-making so that it and the Grantee can understand the impact of the Grant and how to improve the impact of grant-making moving forward, and for the benefit of other Grantees and for Larimer County and its residents. Although most project evaluations are based on the program and expenditure reports, onsite evaluations may be initiated at any time during the grant period at the discretion of BHS staff.

Grantees are strongly encouraged to keep in regular and ongoing contact with the BHS Program Manager regarding project developments, progress, potential problems, revisions, advances in the project, success stories, and upcoming project-related meetings or events. BHS staff may require regular conference calls or e-mail updates.

Required Notification

Grantees must provide LCBHS with immediate written notification of:

- (1) any change in your organization's tax status;
- (2) any inquiry or audit by the Internal Revenue Service;
- (3) its inability to expend the Grant funds for the Grant Purposes;
- (4) any expenditure of Grant funds for any purpose other than the Grant Purposes;
- (5) any changes to Grantee Contacts (Primary/Director/Signatory) and
- (6) any other breach by Grantee of this Agreement.

Future Funding

As stated and acknowledged in the grant agreement (Item "20. Future Funding"), LCBHS has no obligation to the Grantee with respect to any additional or future funding.

Insurance Requirements

As noted in [Appendix A](#) of the grant agreement, prior to commencement of any work, grantee shall forward [Certificates of Insurance](#) to Larimer County c/o Behavioral Health Services, bhsgrants@larimer.org. The insurance required shall be procured and maintained in full force and effect for the duration of the Contract and shall be written for not less than the following amounts, or greater if required by law. Certificate Holder must be "**Larimer County**" Attn: Risk Management 200 West Oak St, Suite 4000 Fort Collins, CO 80521. Risk@larimer.org
<https://www.larimer.gov/behavioralhealth/impact-fund/post-award/insurance>

Grant Agreement Amendments

Programmatic changes to a current grant agreement will require formal prior approval by the LCBHS followed by a contract amendment. Any contract amendment will incorporate the approved revisions, as well as revisions to report due dates and/or payment schedules, if applicable. Please note that an amendment to the Scope of Work, which reduces the total work to be completed in the project, may result in an adjustment of funding.

Adjustments Requiring a Formal Request and Approval

1. Extending the project period (i.e., “no-cost extension”)
 - a. This type of request should be made at least thirty (60) days prior to the project end date. This type of request will result in a contract amendment. Please work with the Program Manager to determine which documents are required.
2. Revising the Scope of Work
 - a. This type of request may result in a contract amendment. Please work with the Program Manager to determine which documents are required.
3. Revising the Budget
 - a. Budget variances that increase or decrease a given line item by 25 percent or more, and by \$5,000 or more (whichever is greater), require pre-approval by LCBHS.
 - b. Adjustments requiring approval may be requested via an e-mail to the Program Manager. Depending on the variance, a formal rebudget resulting in a contract amendment may be required. This would require a revised budget in Excel and a budget narrative.
 - c. Once approved, you will receive notification via email.
4. Other
 - a. Organization unable to fulfill grant requirements, organization dissolving, organization merging with another organization, new fiscal sponsor, etc. Written explanation required.

Adjustments NOT Requiring a Formal Request and Approval

1. Budget revisions under 25% or less than \$5,000 per budget summary line item.
2. Personnel Changes. This type of change does not require a contract amendment. However, any change to the Primary Contact, Program Director, or Signatory, as listed in the original grant documentation, requires prompt e-mail notification to LCBHS staff that a change has occurred and new contact information be provided (when available).

Media and Communications

LCBHS encourages your organization to publicize information concerning the grant in your newsletters, annual reports, press releases, website, and other relevant media.

Please obtain written approval by LCBHS of any content promoting information related to the grant before releasing or publicizing such information, including, but not limited to, press releases, advertisements, signage, and event collateral.

LCBHS expects to be acknowledged as a sponsor for major events by the inclusion of the Larimer County Behavioral Health Services logo in the event promotion materials and print collateral.

Please go to [Grantee Communications Support](#) for more detailed information on:

- Brand Standards
- Logo Usage
- Guidance for Written Acknowledgements
- Sample Press Release

Social Media

BHS Website: larimer.gov/behavioralhealth

Twitter @bhs_LarimerCo

Facebook #lcbehavioralhealth

When should you check in?

- If you are producing promotional materials that display our logo
- Mention BHS in written material for public consumption (online, radio, and print)
- Initial check-ins for appropriate usage guidance

[LCBHS Green Logo.png](#)

[LCBHS Green Logo.jpg](#)

[LCBHS White Logo.png](#)

Frequently Asked Questions

1. What can grantees expect during the contracting process?

After receiving your email award letter, grantees will need to speak with the Program Manager to review the period of performance start and end dates, budget, objectives, revisions (if applicable), payment schedule, reporting requirements, signatories for DocuSign, any significant changes that may have occurred since the proposal was submitted (such as key personnel changes) prior to receiving the grant agreement. The grant agreement will be sent through DocuSign to the signatory and then countersigned by the County. Payments will be made once the agreement is signed.

2. What is expected of grantees?

All grantees are expected to comply with reporting requirements and submit their reports on time. Grantees are expected to keep in regular and ongoing communication with the Program Manager and provide updates on the progress of the funded project.

3. What should a grantee do if the proposed work runs into unforeseen challenges?

It is not uncommon for unexpected variances to occur throughout the project period. These range from underestimating or overestimating the project's expenditures, staffing changes, or delays in completing the project by the deadline. When the grantee realizes that their funded project is not on track or that variances are occurring, they should contact the Program Manager to discuss the situation. LCBHS will determine whether or not a formal amendment to the agreement needs to be initiated. If an amendment is required, the Program Manager will request that the grantee submit its request in writing, detailing the need and/or justification for the change, along with the necessary revised reports showing these variances (SOW and/or Expenditure Report, if applicable).

4. What if there are changes to the project, but an amendment is not required?

Certain adjustments can be made without having to formally develop an amendment to the original grant agreement/contract. Grant funds are considered restricted funds and should be accounted for and tracked separately in the organization's financial statements. Any adjustments to individual line items that result in an increase or decrease of more than 25% or \$5,000 (whichever is greater) from the original amount specified in the grant budget should be submitted in writing for approval to Larimer County Behavioral Health Services in advance of expenditure to ensure the changes align with the goals of the grant.

5. What happens when a project has underspent the grant funding provided to them?

In the final evaluation report, the grantee should indicate the unspent funds and reasons for under-spending (e.g., fewer expenses than expected, delayed hiring, etc.). The grantee will be instructed to return all unspent funds to "**Larimer County**" and mail a check to Larimer County Behavioral Health Services, Attn: Program Manager, 2260 W. Trilby Road, Fort Collins, CO 80526. Please note that the grantee is not allowed to retain the remaining grant funds or apply them to other projects or other activities outside of the scope of the grant agreement.

6. How does a grantee know which reports are due and when?

This information can be found in the “Reports / Report Schedule” section of the signed grant agreement. The table provides the report type and corresponding due dates. The grantee will also receive two system-generated e-mails reminding them that reports need to be completed at 60 days and 30 days prior to the due date.

7. Can reports be submitted early?

Yes. However, the soonest a grantee can submit their reports in the grant portal (SmartSimple) is 30 days prior to the due date. Otherwise, it will not capture the entire program/project reporting period.

8. When are payments made and how often?

This information varies by grant and can be found in the “Grant Award & Payment” section of the grant agreement. Please note that some payment timeframes are dependent upon the grantee submitting their required reports by the due dates and the LCBHS staff’s approval of the reports.

9. How does a grantee know if their reports have been approved?

If LCBHS staff have questions about the reports, they will contact the grantee to seek clarification. Revisions and resubmission of reports may be requested. Once the reports have been approved, the grantee will receive an automatically generated e-mail from SmartSimple with notification that the report has been approved. Reports are reviewed within 30 days, and approvals depend on what questions, if any, need to be addressed.

If you have questions, reach out:

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