

After You Receive Your Award

The proper management and oversight of your award is as important to its success as the technical work being performed. Please keep in mind the following principles to help ensure the objectives of the award are accomplished in a timely and effective manner.

Communication

There are two officers at CRDF Global invested in the success of your project—these officers are identified on the Cover Sheet of your award agreement. Good communication between you and your award officers is key to managing potential problems with your project. Below are the roles of each officer:

| Grant/Contract Officer | Program Officer |
|--|---|
| Drafts and negotiates award agreement; sole authority to interpret, modify or amend any provision of the agreement | Provides programmatic and technical guidance |
| Monitors financial management and compliance with policies | Acts as a representative to communicate with the funder |
| Approves financial reports | Approves technical progress reports |

Timelines

Be aware of your project timeline. The agreement period is the timeframe for when you can incur expenses and complete the objectives of your award. Once the agreement period ends, you may not incur any further expenses. Monitoring your award timeline is also very important to ensuring that reports are submitted according to the required schedule. If you are unsure of the timeline, reporting schedule, or unable to submit a report on time, please let your officers know immediately.

Documentation

Properly documenting the expenses you and/or your project team incurs is one of the most important aspects of successfully managing a grant. All expenses should have a receipt, invoice, or other payment confirmation that details the “who, what, when, why, and how” of the payment.

- Who was the payee?
- What was purchased?
- When was the purchase made?
- Why was the purchase made (e.g. how did it benefit the objectives the award)?
- How were funds transferred to the payee?

Please keep in mind that when purchasing goods or services with a cost of \$3,500 or greater from a single vendor, you are required to obtain quotes from at least three potential vendors and to select the vendor that provides the best value to the project. You will be asked to provide a [selection justification](#) describing the competitive process along with the specific written quotes.

Managing Payments

Once your award is activated, you may begin to request funds. You will submit your [payment requests](#) to the Grant/Contract Officer listed on your award agreement. Once a request for payment has been submitted, it can take up to twelve business days until you receive funds.

CRDF Global generally provides payment in U.S. Dollars by electronic wire transfer. Due to the nature of international wire transfers, it is very important that the bank account information you provide us is accurate, otherwise the payment may not be successful. You may want to ask your bank for international wire transfer information.

There are three main options for managing award payments:

| Option | How it Works |
|-----------------------|---|
| Reimbursement | Awardee is paid for actual, properly documented expenses |
| Advance | Funds are provided to Awardee for immediate expenses; Awardee reports back with actual costs and proper documentation; unused funds are returned to CRDF Global |
| Direct Vendor Payment | Vendor is paid by CRDF Global; goods/services are delivered to Awardee |

Unless your award contains fixed price or fixed obligation terms, all payments are cost-reimbursable, meaning they are intended to cover actual expenses only. Any unused or remaining funds must be returned to CRDF Global.

Advance Payment Requests

If you require funds in advance to start the implementation of your project, you must submit a [request form](#) or invoice that explains the anticipated use for the advance—with specific expenses detailed—and the amount requested. You will likely be asked to provide supporting documentation like quotes from vendors you intend to pay. An advance payment request should be based only on what you will require for immediate cash needs. CRDF Global will generally not advance funds greater than 50% of the award value or for a period of longer than three months of use at a given time.

When you have expended the funds, you are required to submit a [financial report](#). Please see the section below entitled “Financial Reporting/Requesting Reimbursement” for requirements.

Only after CRDF Global has received and accepted your financial report will you be able to request another advance payment. The cycle of advances and financial reports is displayed below:

Diagram of Advance/Reconciliation Process



Financial Reporting/Requesting Reimbursement

When preparing a [financial report](#) or [request for reimbursement](#), you must submit the following documentation:

- A. Summary of expenses in each budget category
- B. List of all individual expenses (with cost in currency of payment and U.S. Dollar equivalent)
- C. Supporting receipt/invoice/payment confirmation for each expense
- D. Vendor [selection justification](#) for any purchase over \$3,500 (with supporting quotes)

Currency Exchange Rates

For expenses in local currency, you will need to determine the U.S. Dollar equivalent cost based on current exchange rates. One way to do this is to use the exchange rate your bank has used to convert a payment received from CRDF Global. You may also refer to the historic exchange rates available on www.oanda.com. If no exchange rate documentation is provided or CRDF Global is otherwise unable to verify the exchange rate you used, the historic rate available on www.oanda.com for the date of expense will be used.

Direct Vendor Payments

Whenever possible, but especially for large purchases, CRDF Global prefers to make payments directly to vendors on your behalf. A request for a direct vendor payment should include the following documentation:

- A. A line item invoice from the vendor including unit price and quantity, delivery to your location and any required warranty
- B. Bank account information for an international wire transfer to the vendor
- C. Contact Information for a vendor representative
- D. Vendor [selection justification](#) (for purchases over \$3,500)

After receiving your request, CRDF Global will contact the vendor to place the order and make payment on your behalf. The standard payment procedure to a vendor is 50% in advance payment, and upon delivery of the equipment or supplies, the final payment will be issued. You must confirm in writing when you receive the good or service from the vendor.

Vendor Selection

As mentioned above, when purchasing goods or services totaling \$3,500 or greater from a single vendor during a single purchase, CRDF Global requires you to perform a competitive vendor selection. A competitive selection process means at least three separate potential vendors are given an opportunity to bid on providing the good or service. The following factors should be taken into account when reviewing bids:

- Cost
- How well the bid meets the technical requirements
- Past performance of a bidder
- Warranty and maintenance terms
- Delivery and payment terms

Please be prepared to submit the quotes you have received along with an analysis or written explanation of why the vendor was selected.

Sole Source Selection

In limited circumstances it may not be possible to perform a competitive selection of a vendor. This is referred to as [sole source selection](#). In order for a sole source selection to be approved, you will have to provide an explanation to CRDF Global as to why only one vendor was able to provide the good or service or why competition was otherwise not possible.

Equipment Care and Use

Equipment purchased with CRDF Global award funds becomes the property of the awardee. You will be asked to provide a [certification](#) from your institution that the equipment has been received and has been placed on the institution's balance sheet. Please note any specific equipment use requirements in your award agreement (such as a usage log) and take care to maintain the equipment in a manner consistent with its specifications for reasonable care and security.