

Nuts & Bolts: Grants Management and Regional Outreach

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Agenda

- Introductions
- Refresher: Grants Management and Compliance Expectations
- Report Examples
- Regional Outreach
- Questions



Meet your ACL Team

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Grants Management/Compliance



Reporting Timelines (Programmatic)

- Semi-Annual Report: Due 30 days after the end of the reporting period
- Final Report: Due 120 days after the conclusion of the grant period
 - Due Date: October 29, 2029

Reporting Period	Semi-Annual Report Due Date
July 1st-December 31st	January 31st
January 1st-June 30th	July 31st



Grant Products

Your Project Officer **must** review and approve all products produced using grant funds (including staff time) or that mention ACL prior to public dissemination

- What kinds of materials need to be reviewed?
- What are ACL Project Officers looking for in their review?
- How far in advance of publication, distribution, etc. should you send materials for review?



Grant Products

All materials created using **any** grant funds must include the [required Stevens Amendment product disclaimer language](#).

If you have any questions about this, please contact:

Clayten Eggleston

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Grants Management Specialist



Training

OAA § 215(e)(1)(H): "Pension counseling and information programs . . . provide[] training programs for staff members, including volunteer staff members, of pension and other retirement benefits programs..."



Data Collection

Client-Level Data

- Demographics (age, gender, race, income)
- Legal issues
- Level of service
- Client outcomes (including recovery amounts)

Outreach Activities

- Outreach location
- Method
- Frequency



Reports: Purpose

- The primary tool/method by which the grantee communicates accomplishments and progress made towards achieving project goals and objectives
- Reports should be written clearly and understandable for a wide range of readers:
 - Organized per ACL guidance
 - Written as a narrative
 - Attachments: Data and Deliverables

Source: [Guidelines for Preparing Performance Reports for Discretionary Grants Supported by the U.S. Administration for Community Living](#)



Reports: Content Guidance

- *What did you accomplish during this reporting period and how did these accomplishments help you reach your stated project goals and objectives? Please note any significant project partners and their role in project activities.*
- *What, if any, challenges did you face during this reporting period and what actions did you take to address these challenges? Please note in your response changes, if any, to your project goals, objectives, or activities that were made as a result of challenges faced.*
- *How have the activities conducted during this project period helped you to achieve the measurable outcomes identified in your project proposal*
- *What was produced during the reporting period and how have these products been disseminated? Products may include articles, issue briefs, fact sheets, newsletters, survey instruments, sponsored conferences and workshops, audiovisuals, and other informational resources.*



Examples



Example 1

This reporting period, the [REDACTED] assisted **161 persons** with pension concerns between January 1 and June 30 [REDACTED]. Of this total, 63 clients resided in [REDACTED], 33 in [REDACTED], 7 in [REDACTED], 4 in [REDACTED], 10 in [REDACTED], and 26 in [REDACTED]. The remainder of these clients resided outside the [REDACTED]'s region; but in most cases, their pensions resulted from regional employment, or their pension plans were administered from within the project's [REDACTED] area.

From January 1 through June 30 [REDACTED], the [REDACTED] office served 45 clients, with 23 pension issues resolved by the hotline attorney, 22 receiving extended services by means of a pension investigation and had 11 recoveries to report for this period. This resulted in a total of \$1,378,210.10 (cash accumulated) and \$1,050,051.94 (present value), in pension benefits recovered for this reporting period.

The [REDACTED] office served 116 clients, with 37 pension issues resolved by the pension attorneys, 79 receiving extended services by means of a pension investigation or have been accepted for investigation and had 7 recoveries to report for this period. This resulted in a total of \$981,790.39 (cash accumulated) and \$1,616,211.22 (present value), in pension benefits recovered for this reporting period.



Example 2

B. Regional Outreach

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

- **Develop yearly outreach plan.**

During this reporting period, the [REDACTED] and [REDACTED] offices as well as our grant partners provided outreach activities. Below is the list of Outreach Activities the [REDACTED] and [REDACTED] offices engaged in during the July 1 [REDACTED] through the December 31 [REDACTED] reporting period.



Regional Outreach



Regional Outreach

The expectation is that grantees **provide equivalent services throughout their region**. This can be achieved through outreach efforts and networking.

Specific outreach activities can be found in the NOFO:

- 1. Deliver outreach opportunities throughout the service region, including any planned collaborations with community organizations, social service agencies, and other groups.*
- 2. Target traditionally marginalized populations, including people of color and others, such as those with limited-English proficiency, those residing in rural areas and individuals with low-income who have been historically underserved, marginalized, and adversely affected by persistent poverty and inequality who are in need of pension access information and assistance*
- 3. Coordinate with NPARC regarding... outreach efforts.*



Outreach Examples

Consumer Facing

Attend state fairs to network with older adults

Provide warm introductions between community-based organizations (CBOs) and local attorneys

Develop 1 pager on program

Professionals

Lead a virtual training program

- Bar associations
- Aging services professional

Train legal aid providers on spotting pension issues

Develop and share educational materials with CBOs



How can we assist you?

- Brainstorming Sessions
- Supporting strategic planning
- Facilitating network connections
- Providing opportunities to support training and closing knowledge gaps in pensions



Questions?
Thank you!