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Best Practices for Productive Island Grantor/Grantee Relationships

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This resource is designed to encourage meaningful dialogue between federal grant officers and territorial and freely associated state (T/FAS) jurisdictions, based on insights from T/FAS grantees and champions. It supports strong working relationships by helping both sides navigate common differences in systems, timelines, and local context.

Whether you're new to this work or aiming to deepen existing partnerships, these tips offer practical ways to foster mutual understanding, strengthen engagement, and improve collaboration throughout the grant lifecycle. By promoting open communication and setting clear expectations early, grantors and grantees can set themselves up for successful grant implementation and positive impacts for T/FAS communities.

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Getting Started: Shared Vocabularies and Understanding

Productive grant relationships require some degree of shared understanding. At a foundational level, grantees should understand grantor requirements and reporting structures, and grantors should understand grantee operating conditions and priorities. The following resources can help to build this foundational knowledge prior to the first meeting between grant management staff.

Resources for Grantors

- [The World Factbook](#) by CIA
- [Island Areas 101](#) by ASTHO
- [A Learning Series on United States Territories and Freely Associated States](#) by ASTHO
- [Improving Indirect Cost Rate Use in Island Jurisdictions](#) by ASTHO

Resources for Grantees

- Notice of Award
- [Grants Management Academy](#) by CDC
- [Healthy Grants Workshop](#) by HRSA (note: not entirely focused on HRSA)
- [Pacific & Virgin Islands Training Initiatives](#) (Note: Finance and health agency staff may coordinate with the Pacific and Virgin Islands Training Initiatives to arrange tailored training; fees apply.)
- [Federal Finance Assistance Regulations](#) as defined in the Code of Federal Regulations
- [Find your PMS Liaison Accountant](#) by HHS
- [Implementing Indirect Cost Rates in Island Jurisdictions: Best Practices and Resources](#) by ASTHO

 **Tip:** Be mindful of island time zones as initial calls are scheduled
some Pacific jurisdictions are 12-14 hours ahead of ET!

Building a Strong Foundation

Whether beginning a new grant relationship or strengthening an existing one, it's important to approach these partnerships with curiosity, creating space for open dialogue and asking thoughtful questions. Fostering this kind of exchange can support mutual understanding and better align expectations, which in turn supports more realistic, impactful program planning.

Consider raising these questions during initial project meetings between project officers (POs), technical monitors (TMs), and grantees. While grants management specialists may not regularly participate in meetings with grantees, they are the source of authority on what is allowable.

Table 1: Grantor and Grantee Questions/Comments for Initial Project Meetings

Topic Area	Grantor Questions/Comments	Grantee Questions/Comments
Points of Contact	“Who are the key points of contact for this grant? Do they lead other projects as well?” (relevant for understanding available bandwidth) “Here is an overview of the names, roles, and responsibilities of the various federal staff who will be involved in this grant, as well as what sorts of questions each person can answer...” (include PO, TM, and GMS) “Outside of my support, here are some additional contacts that can assist with financial and system-related questions...” “What other grants are you managing from my agency, and from partner agencies? If it’s okay, can you share project officer contacts?”	“These are our key points of contact for this grant. These individuals also lead X project(s)....” “For the purposes of this grant, how do the PO, TM, and Grant Management Specialist (GMS) differ in scope and authority? (This information will help you direct future questions)” “If I need assistance during my business hours, but it is after hours for my project officer or grants specialists, will there be a designated time that someone is available to provide real time assistance?” “If our project officer is out of office or unavailable, who is the appropriate point of contact for project-related questions or decisions?”
Lessons Learned	“What worked well in your past relationships with POs or TMs?”	“These are ways in which we worked well with our previous POs/TMs... Is this something you would like to maintain or change?”

Topic Area	Grantor Questions/Comments	Grantee Questions/Comments
Grant Terms and Logistics	"To help us stay aligned throughout the grant period, I'd like to propose regular check-ins." (monthly/bi-monthly/quarterly) "Do you have any questions about the grant information included in the NOA (e.g., reporting timelines or drawdown processes?" Or, alternatively, "Would you like for us to walk through the NOA section by section now, or schedule a different time?"	"To confirm that we are meeting expectations, is there any additional information you'd like us to include in our reports beyond what's outlined in the grant agreement?"
Trust Building	"What drew/motivated you to work on this particular program?" (also share PO's/TM's background)	"What drew/motivated you to work on this particular program or with islands?" (also share grantee's background)

 **Tip:** As you have these conversations, be explicit about expectations and priorities. Lean on screensharing, detailed notes, and timely feedback.

Understanding the Platforms and Tools

Open dialogue between POs/TMs and island grantees about the tools and platforms used to manage federal grant funds can help POs/TMs better understand T/FAS technological constraints and capacities. Meanwhile, this gives grantees an opportunity to learn more about necessary federal grant management systems and share key context that may affect implementation. For example, the U.S. Virgin Islands Department of Health's financial software limits the agency's ability to split staff salaries across more than two grants, and two-factor authentication processes are a challenge in the FAS due to their international IDs and lack of a Social Security Number. Proactively discussing these operational realities can help both parties identify practical solutions or process adjustments that reduce delays and improve coordination.

Beyond any grant-required financial platforms, grantees should also consider establishing (or gaining access to) a local resource through which they can monitor grant spenddown.

This “real-time” tracking may be more helpful in conversations with grantors than Payment Management System (PMS) drawdown numbers. PMS drawdowns often lag behind local perceptions of “spenddown,” due to one or both of the following: 1) recently submitted PMS drawdown requests may not be visible to POs accessing PMS, and 2) the reimbursement structure of federal funding means that islands have “spent” money not yet submitted for reimbursement via PMS.

Another recommendation for grantees, particularly when grants management is centralized outside the health agency, is to establish a resource that documents key grants management points of contact and reference information. For example:

- The performance, financial, and reporting systems associated with each grant.
- Who can access each system, as well as login or password information.
- Troubleshooting guidance (e.g., PMS liaison contact information).
- Mapping local grant or account nomenclature with the official grant numbers or subaccounts used within these systems.

Saving this information in a secure location, accessible to health agency leadership, can promote smooth staff transitions, quicker troubleshooting, and easier grant establishment and closeout. U.S. Virgin Islands Department of Health, for example, has project managers send all relevant grant information to a central email address, for easy reference in case of staff turnover.

Table 2: Grantor and Grantee Questions/Comments for Understanding Platforms and Tools

Topic Area	Grantor Questions/Comments	Grantee Questions/Comments
Systems, Tools, and Access	“Here are resources to help you understand and use the systems required for this grant (e.g., PMS, GrantSolutions, SAM, Redcap).” “What software do you use for payroll? Procurement? Who on your staff has access to this system for the purposes of this grant? If access is limited, how do you plan to monitor spenddown?”	“What systems will we be required to use for performance tracking, reporting requirements, and financial management (e.g., PMS, GrantSolutions, SAM, Redcap)? We want to ensure the right staff have access; let’s talk through the participants from [jurisdiction] to support this grant and prepare for future troubleshooting.” “Who will need access to these platforms locally, and how will we ensure the right staff are trained and prepared to use them efficiently?”

Topic Area	Grantor Questions/Comments	Grantee Questions/Comments
Drawdown and Financial Processes	“Here is what is required to submit and process a drawdown request for this grant...”	“For financial and system-related questions (e.g., drawdown issues or resolving discrepancies), is there a formal process or point of contact we should follow?”
Local System Challenges	“Are there any barriers or best practices related to your local financial and grants management platforms that you would like to highlight? If there are barriers — whether from local systems or grantor systems — please share and elaborate so we can improve or make changes if possible.”	“These are the successes and challenges we have experienced related to grants management, including platform limitations or process constraints.”
Troubleshooting and Points of Contact	“If you have any financial or systems-related questions, (e.g., drawdown issues or resolving discrepancies), here is the formal process you should follow...”	“How should we escalate or resolve issues with grant-related systems? Who are the appropriate contacts, and what are the timelines for resolution?”

 Tips:

- 1) Be sure to identify training options, reference guides, and points of contact (both federal liaisons and T/FAS staff who can access) all required systems.
- 2) Local systems for managing funds and monitoring performance will vary across jurisdictions. It’s important for grantors to understand the capacities of these local systems, as well as what level of direct access project staff have (particularly if grants are centrally managed outside of the health agency).

Understanding Grant Processes

T/FAS health agencies have unique challenges tied to their political status and governance structures. These challenges can shape local grant processes and timelines to look different in a T/FAS than they would in a U.S. state. Proactively discussing grant processes and points of contact can help both parties identify practical solutions or process adjustments that reduce delays and improve coordination.

Across the T/FAS, budgetary and financial governance structures vary considerably. For additional information, reference Figure 4 in the 2023 [“Improving Indirect Cost Rate Use in Island Jurisdictions”](#) report, which lays out key grants management responsibilities across programmatic and non-programmatic staff in each of the T/FAS. In situations where grants management responsibilities lie outside the health agency, problem-solving can be complex and/or time-intensive, as solutions may require steps beyond the control of the T/FAS health agency.

As an example of these challenges, consider the behind-the-scenes processes at the Federated States of Micronesia national health agency (FSM National). Before FSM National can spend down awarded grant funds, the FSM Congress must approve the funds and establish an account. The Congress meets just once a quarter. Additionally, almost all funds to FSM National get passed to the four FSM state governments, in which the state legislatures must also approved awarded funds and set up accounts. This process can take months. In addition, FSM National maintains a small health agency, with just one staff member responsible for managing drawdowns and financial monitoring across more than 70 projects. Between governance structures, small island health agencies, and significant time zone differences, communication and drawdown challenges are a common concern.

Some island jurisdictions are engaged in ongoing improvements to key business processes like procurement, hiring, drawdowns, and cross-agency coordination. Many islands are moving toward a more centralized grants management system, while also moving from paper-based to electronic systems. These initiatives will strengthen grants management in the long term, though they also require significant commitment from key stakeholders to address long-standing challenges.

Table 3: Grantor and Grantee Questions/Comments for Understanding Grant Processes

Topic Area	Grantor Questions/Comments	Grantee Questions/Comments
Overview and Timeline	“To better understand your local processes and timelines, could you walk me through your jurisdiction’s steps for setting up an account for this grant? Who is involved in the approval process, at what stages, and how long does each step typically take?”	“Just to provide helpful context, we’d like to walk you through our local process for setting up grant accounts for federal funding. This includes who approves what, typical timelines, and factors that might affect how quickly we can access and manage funds...”
Opportunities for Improvement	“Is your agency undertaking improvements to your grants management processes? What are they?” “Can you share any other insights on what works well or what tends to be challenging when it comes to local grants management?”	“We are always monitoring opportunities for improvement and are working on [insert area]...”

 Tips:

- 1) Island grants management staff may oversee multiple grants across different funders, each with different rules. Be sure to check assumptions about a particular grant’s requirements around indirect cost rates, matching requirements, carryforward, and other common concerns!
- 2) If there is tension or uncertainty, be sure to tie your questions and responses to the NOA and the relevant CFR language. This language, as interpreted by the GMS or grant management officer, is the final source of authority on what is and is not allowable.

Building Momentum and Sustaining the Relationship

Throughout the grant period, it can be especially valuable to revisit the key areas highlighted in this resource. Regular check-ins can help maintain continuity and support long-term sustainability, particularly as staffing changes occur over the course of the project. At the close out of the grant period, take time to reflect together on what worked well, what could be improved, and what might need to change moving forward.

Conversation topics could include discussing the frequency of check-ins, adjusting communication approaches, or even planning a future site visit to the island jurisdiction — ASTHO's favorite recommendation! If there will be new staff in the coming year, consider using this document to facilitate a warm hand-off. Revisit any relevant grant guidance to ensure it's up to date and update any local documentation for organizing grant logistics (e.g., systems, passwords, points of contact for troubleshooting, etc.).

 **Tip:** It's important to keep up with any changes from the Federal or the island grants management systems, processes, and staffing; revisit your guidance regularly to ensure it is up to date!

Have questions about this resource? Please contact islandsupport@astho.org.

Background

This product was created by the Island Areas Workgroup (IAW) — Health Financing Subgroup. Established in October 2021, the IAW brings together representatives from island jurisdictions, federal agencies, and trusted partners to address key administrative challenges impacting health outcomes in island jurisdictions, including efforts to strengthen procedures and organizational policies affecting health financing, data capacity, and workforce development.

The Health Financing Subgroup drafted this resource with input from T/FAS grants management staff, nonprofit partners, and federal agency representatives. The subgroup thanks all participants for their insights and feedback.