**WHAT TO DO WHEN A REQUEST IS**

**RECOMMENDED FOR AWARD**

**ON THE BOARD AGENDA**

September 7, 2011

After the program staff has meet to determination recommendations for award or declination for the upcoming Committee agenda, they will provide the pending requests log with the disposition of each request indicated to the Program Assistant. They will also keep the Assistant updated after their Committee has met and made decisions so she is able to make the changes accordingly in the Gifts database and on the Budget Worksheet.

Find each request (one at a time) in the Gifts database.

Double-click to open it.

Change status from Pending Staff Review to Staff Recommends.

Change staff to whichever program officer will be preparing the GPR form.

Add meeting date in meeting date field.

Enter the amount recommended in the recommended amount field.

In the Codes tab, enter the Program Area down to the sub-category level.

After updating the Gifts database, the Program Assistant will add each recommendation to the appropriate Sector tab of the Budget Worksheet, which is located in the current year directory (for 2011 it is at H:\WPDATA\2011\BUDWKS11.xls).

Each recommendation is listed by sector, and also uses a subsector code. The organization’s name is placed in the first column. The recommended amount is entered in the “Proposed” column. The next column is the subsector code, and the last column represents which quarter the grant will be reviewed in. The total of each of the sector tabs will automatically pull into the summary tab. As any changes are made, be sure to update the worksheet so it always agrees with the database.

The **Program Assistant** will try to keep the Grants Administrator apprised of any changes to the recommendations.