



Date of TA Intake: Click or tap to enter a date.

Grantee: _____

Interviewee: _____

TFMC Interviewer: _____

Thank you for taking the time to speak with us today. My name is [insert names] and we are [insert roles] for the Office for Victims of Crime Tribal Financial Management Center. The purpose of today's call is to help us prepare for our upcoming [onsite][virtual] Technical Assistance (TA) session and to provide an opportunity for you to ask any questions you have prior to the TA session.

We will ask questions about the staff who work in your organization to ensure that we schedule TA activities with the appropriate individuals when they are available. We will also ask a few questions about your financial practices to help us better understand your current financial capacity. This information will be used to help inform the TA activities.

This call will take approximately 1 hour. Do you have any questions before we begin?

Personnel and Logistics

1. When we last spoke to [insert name] we learned that there was [one][more than one] person at your organization with financial grant-related responsibilities, including [list names and roles, taken from the Intake Assessment]. Have there been any changes? [if yes, capture changes]
 - a. Are there staff that are full-time equivalent (FTE) dedicated to financial management of this grant?
 - b. Are the staff responsible for financial management split between projects? [if yes, probe for more information, how many projects? Same funder, etc.]
2. [For onsite TA] For us to best assist your organization with its financial needs we would like to speak with all staff with financial responsibilities during our visit, including [insert names]. It would be best to schedule the visit at a time when all relevant staff can participate. What would be the best timeframe? [provide as much information as you can about the site visit to help work through any potential availability issues]
3. [For virtual TA] For us to best assist your organization with its financial needs we would like to contact all staff with financial responsibilities during our virtual TA. It would be best to schedule the virtual TA session at a time when all relevant staff can participate. What would be the best timeframe? [provide as much information as you can about the virtual TA to help work through any potential availability and technology issues]
4. Can you please provide me with the contact information for [insert names of staff that we will speak with during TA]?
5. Do you have any logistical or administrative questions for us about the [onsite][virtual] TA session?

Financial Infrastructure Questions

6. [During our intake assessment you mentioned you had X current federal awards, and X are from OVC. Is that still the case?] [How many OVC grants do you currently have]?



7. Have you scheduled or already had a kick-off meeting to engage tribal leadership, stakeholders, and team members?
8. As grant implementation begins, please describe your plans to manage:
 - a. The monitoring of the financial progress of the grant?
 - b. Internal reporting (communication with Tribal leadership, stakeholders, and team)?
 - c. External reporting requirements to OVC?
9. Please share with us any immediate Financial Management TA needs you may have.
10. What is a strength of your organization related to the implementation of the financial components of a grant?
11. Do you anticipate any challenges related to the implementation of the financial components of the grant?
12. Do you have any questions for us about the TA session? *[probe for questions about documents that we might want to review, activities and when they might occur, TFMC staff that are going and other general expectations about the visit. This is a good opportunity to alleviate grantee anxiety about our visit.]*

Thank you for taking the time to speak with us. The information you provided will be incredibly helpful to us as we finalize the details of your TA. *[insert information about next steps re: the site visit. Do they have action steps that we want them to do prior to our TA? If so, gently remind them here. If we have action steps, remind them of what we are doing next.]*

We appreciate you taking time with us today. If you have any questions after this call, please feel free to email *[insert contact information for assigned FS and/or PS]*. We are looking forward to working with you.