

Grant Management

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Congratulations – you've won a grant. Now what?

1. Celebrate!
2. Meet with administrative, fiscal, and program staff to review the grant.
3. Find out if there is a grants management document/booklet outlining the administrative rules.
4. Assign various tasks to appropriate staff.
5. Hold a meeting (with Minutes) to review the grant and finalize start-up plans. If appropriate, include any partners and provide a copy of the grant (or the part that includes them). Inform them of the funds for their part and how the funds will be provided. Discuss reports and deadlines, as well as consequences of non-compliance.
6. Draft a timeline (include a reporting calendar) for all key personnel.
7. Announce the grant award to the community and publicly thank the funder.
8. Reporting - typical reports include:
 - a. Financial review: update expenditures and funds remaining
 - b. Program implementation: update on what has been accomplished to date relevant to the original plan.
 - c. Program Outcomes: Provide information on evaluation activities and how well the program is producing the planned results.
 - d. Change of Plans: Depending on the extent of the change, you may need to request permission from the funder (see #11)
 - e. Challenges, Successes, and Lessons: Update on specific challenges, or successes, and lessons learned to further inform the program.
 - f. Attachments: Attach any relevant documents such as letters or news clips.
9. Only expend funds as laid out in the approved grant budget.
10. Never use funds from a grant for items not included in the grant budget or for purposes other than described in the grant narrative.

11. If the original budget needs to be amended in order to support the purpose of the grant, contact the funder to get permission before making changes. There may be rules about how much funding can be transferred from one category (such as stipends) to another (such as supplies).
12. Support every expenditure with adequate documentation.
13. Use a system of checks and balances so that no one person is solely in charge of the money, e.g., dual sign-offs on expenditure requests and checks.
14. Keep receipts, documentation, and monthly financial statements well organized and accessible.
15. Monitor grant expenditures monthly to ensure that over-spending or under-spending can be addressed before the end of the grant period.
16. If appropriate, check in periodically to observe the program in action.



* Before coming to Readorium, Evelyn Wolff PhD, was the grant writer for the Hackensack NJ and Teaneck NJ Public School Systems. Dr. Wolff has managed numerous public school grant programs worth millions of dollars.