

# Checklist for Managing Your Grant

## Collaborative Effort

- Creating a detailed project timeline that ties to the proposal and contains benchmarks
- Monitoring and reviewing the project timeline and benchmarks
- Keeping track of spending
- Determining what documentation of time and effort will be needed

## Primary Investigator and Project Team take the lead

- Completing the project on time and within budget
- Obtaining approval from the Grants Office on changes in project timeline or budget
- Notifying the Grants Office immediately of proposed changes to the project
- Notifying the Grants Office of changes in project timeline
- Assisting with project status questions
- Providing updates and access to the project during all stages of development
- Assisting with details for media coverage and, if needed, providing quotes or participating in interviews on the project
- Reminding all involved in project work to document work done and time spent
- Processing invoices and time certifications
- Completing [Personnel Action Change Forms](#)
- Minute taking
- Creating narratives for interim and final project reports to funders
- Communicating with partners on project work-related items

## Grants Office takes the lead

- Assuring project work is in line with what was proposed to and approved by the funder
- Assisting with invoicing questions
- Obtaining and documenting approvals from funder to change budget or work of the project. In some cases, the Primary Investigator may do the communicating with the funder. In those instances, the Grants Office would craft the requests to be shared.
- Determining allowability of spending
- Monitoring spending
- Updating the College on status of projects in development
- Reviewing and editing narratives for interim and final reports to funders
- Working with Fiscal in creating budgets for interim and final reports to funders
- Coordinating with the President's Office to generate media coverage and press releases
- Collecting documentation from all involved in project work and staff time spent
- Communicating with partners on contract related items
- Setting up internal progress and budget review meetings

## Fiscal takes the lead

- Providing a unique budget code for the project
- Providing monthly spending updates
- Completing drawdowns (if applicable)
- Creating budgets for interim and final reports to funders