

Checklist: Grant Management Essentials

Congratulations! All your hard work has finally paid off and you received a grant to fund your work! Now what? Check off these essential grant management steps as you go forward. For more guidance on this topic, visit the Open Rivers blog article, [Grant Management from Receipt to Renewal](#).

1

Gratitude and Celebration

- Thank the funder
- Thank collaborators

2

Review the Proposal

- What are the primary objectives?
- What are the main benchmarks?
- What are the evaluation methods?

3

Review the Grant Agreement

- Who is the primary contact person?
- When and how will you receive the funds?
- Are there any restrictions on how the funds can be spent?
- What is the grant time period?
- How should the funder be acknowledged?
- What are the reporting deadlines?
- What if the programming or budget changes?
- Are there any other requirements by the funder?

4

Loop Everyone In

- Funder Contact Information
- Important Dates
- Funding Purpose and Restrictions
- Funder Acknowledgement
- Overall Budget for Programming
- Accounting Codes and Grant Time Period
- Reporting content that will be needed eventually

5

Calendars and Database

- Calendar reporting deadlines
- Calendar programming benchmarks
- Calendar informal updates to funder
- Enter grant details and contact information in database

6

Get Paperwork in Order

- Send funder any further documents that are required
- Create and/or organize digital files
- Create and/or organize hard copy files