Checklist for new Executive Directors

A new director should contact the program manager of their agency's grant(s) to inform them of new agency leadership and point of contact as well as ensure that the organization is in compliance with the grant contract(s). Furthermore, the director should feel comfortable contacting the program manager with any questions, concerns, adjustments to the budget, grant extensions, or any other grant-related questions. Written correspondence to and from program managers regarding approvals or other important information should be archived in case of an audit.

- [ ] Assess the current grant funding in the coalition and determine what funding is about to come in.

- [ ] Examine the recording requirement books (such as progress reports, and the programmatic reporting requirements). Also assess the financial recording requirements.

- [ ] Determine what the important due dates are – reporting dates, grant application dates, etc.

- [ ] Identify all points of contact in those grant making agencies, and contact them.

- [ ] Ensure that the agency is up-to-date with all reporting requirements, and be familiar with the special conditions that are attached to most federal monies.
    - When reading a grant, make sure to pay close attention to the solicitation, the <u>special conditions</u>, the purpose areas, and the proposal.

- [ ] The grant making agency should receive any new contact information for the primary contact person within the agency (the new executive director).

- [ ] Check the progress reports and financial reports that were left by the previous executive director.
    - If the financial reports are not done, the coalition could face a number of consequences: funds could be frozen, future grants could impose special conditions, and/or the agency could be designated a 'high risk grantee.'