



Bridge the Gap: Protect the Grants Program During a Staffing Transition

A solid grants program is built on consistent attention to funding opportunities and relationships. So what happens when the grants manager leaves?

Use this checklist to prepare for an unexpected staffing change by taking key steps before, during, and after a staffing transition.

1

PRIORITY BEFORE TRANSITION SAFEGUARD INSTITUTIONAL KNOWLEDGE

- Track grant proposal and report deadlines in a centralized database or spreadsheet.
- Secure copies of grant documents (proposals, reports, and attachments) and award letters.
- File documents on a shared drive to be retrievable by funder and/or fiscal year.
- Log key correspondence and actions with funders in your donor relationship database so someone else can pick up where the interactions leave off.

2

PRIORITY DURING TRANSITION MAINTAIN KEY RELATIONSHIPS AND DEADLINES

- Appoint an interim manager for communications and relationships with funders. Funders may respond most favorably to a senior leader such as the Executive Director or Director of Development.
- Notify active funders about the transition and assure them of the plan to meet deadlines and expectations of the grant.
- Designate someone to temporarily maintain the grants calendar so report and proposal deadlines are met. This may be a staff member or an external resource like Grants Plus.

3

PRIORITY AFTER TRANSITION POSITION THE NEW GRANTS MANAGER FOR SUCCESS

- Prioritize a period of overlap so the interim grants manager can orient the new grants manager to process and funder relationships.
- Send a personalized message to each funder to introduce the new grants manager as their primary contact.
- Ensure staff understand roles and responsibilities for interacting with the new grants manager to prepare reports and proposals and maintain relations with funders.
- Engage the new grants manager in creating or improving organization-wide systems and routines to support grant activity and reporting. After all, they will be managing the process!