**GRANTS RECORDKEEPING CHECKLIST**

**Project Director**

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|  | Original grant notice or solicitation (proposal instructions, RFP/NOFO/RFA, other guidance such as PowerPoint presentations or FAQ documents, etc.) |
|  | For federal grant programs, original Federal Register notice, copy of any relevant legislation or statutory content, and any agency-specific rules and regulations |
|  | Original grant budget as submitted with application |
|  | Original grant proposal as submitted, including all attachments |
|  | I.R.B. (Institutional Review Board) approval documentation, if applicable |
|  | Official award documents from funder |
|  | Completed Grant Award Kickoff Meeting Checklist |
|  | Approved budget and all budget changes and amendments |
|  | Copies of all correspondence and email with funder (including Project Officer for federal grants) as well as external parties (advisory board members, industry representatives, etc.) |
|  | Copies of all internal correspondence and email relating to grant |
|  | Copies of all contracts related to grant activities |
|  | Grant amendments, including request for no-cost extension or change in scope, if applicable |
|  | Copies of all job applications and interview notes for positions funded by the grant |
|  | Copy of RFP and all bids for external evaluator or external consulting services |
|  | Requisitions, purchase orders, and invoices for goods or services, including supplies, equipment, and consultants |
|  | Completed Time & Effort forms for all employees receiving wages or a stipend from grant funds or for employees who are contributing to in-kind matching requirements |
|  | Copies of grant financial status reports (expenditures to date, available balance, amounts billed to grantor, payment status) |
|  | Documentation of eligibility for all project participants (income, first-generation status, GPA or other academic indicators, etc., as required by funder or as outlined in original proposal) |
|  | Participant/student participation records, including attendance at meetings and events |
|  | Documentation of spending for all participant support costs such as internships or stipends |
|  | Meeting minutes from any grant-related meetings with external parties |
|  | Documentation of all marketing and funder recognition activities |
|  | Copies of marketing materials used for project and screenshots of related social media posts |
|  | Copies of questionnaires, surveys, or other evaluation tools plus any other data collected for project evaluation purposes |
|  | When applicable, all scholarship applications and supplemental materials (both accepted and declined applicants) |
|  | When applicable, internship applications (both accepted and declined applicants) |
|  | Travel records, including detailed expense records |
|  | Grant-related conference, training, or webinar attendance records (agenda, handouts, etc.) |
|  | If applicable, Corrective Action Plan and related activities |
|  | Copies of all Progress Reports as sent to funder |
|  | Copy of Final Report as sent to funder |
|  | Copies of any publications related to funded project |
|  | Equipment/property inventory and records |
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**Business Office**

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|  | **Item** |
|  | Original grant notice or solicitation (instructions, other guidance, RFP/NOFO/etc.) |
|  | For federal grant programs, original Federal Register notice, copy of any relevant legislation or statutory content, and any agency-specific rules and regulations |
|  | Original grant proposal (as submitted), including all attachments |
|  | Original grant budget as submitted with application, approved budget, and all budget changes and amendments |
|  | Copies of award documents from funder |
|  | Copies of all internal and external grant-related correspondence and email |
|  | When applicable, subrecipient records (entity name, address, amount, scope of work, W-9 form, subrecipient monitoring documentation) |
|  | Records of eligibility checks for procurement activities (SAM, excluded funders, etc.) |
|  | Copies of all contracts and any grant amendments, if applicable |
|  | Completed Time & Effort forms for all employees receiving wages or a stipend from grant funds or for employees who are contributing to in-kind matching requirements |
|  | Matching/cost share documentation |
|  | Grant financial status reports (expenditures to date, available balance, amounts billed to grantor, payment status) |
|  | Documentation of spending for all participant support costs such as internships or stipends |
|  | Records of any Desk Reviews performed by funder |
|  | College or grant-specific audits and audit resolution documentation, if applicable |
|  | Annual SEFA report(s) (Schedule of Expenditures of Federal Awards) |
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**Grants Office**

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|  | **Item** |
|  | Original grant notice or solicitation (proposal instructions, RFP/NOFO/RFA, other guidance such as PowerPoint presentations or FAQ documents, original Federal Register Notice of opportunity, copy of legislation or statutory content, etc.) |
|  | Original grant budget and all budget changes and amendments |
|  | Original grant proposal (as submitted), including all attachments |
|  | Copies of all correspondence and email related to grant |

**Other**

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|  | **Item** | **Who keeps?** |
|  | Student records in Banner or other digital records systems | I.E.R. |
|  | I.R.B. approval documentation and related materials | I.E.R. |
|  | Grant-related marketing materials and marketing activities records | Marketing |
|  | Scholarship-related documentation (FAFSA records, unmet need, low-income verification, etc.) | Financial Aid Office |
|  | Payroll records (including electronic time sheets) | Human Resources |
|  | Copies of all job notices, job applications, and interview notes for all positions funded by the grant | Human Resources |
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