

# Grants Management Lunch and Learn Series

## *Managing Multiple Grants Without Chaos*

On behalf of the State of New Jersey  
Department of the Treasury, Grants Management Office  
March 10, 2026

# Learning Goals for Today

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1. Identify root causes of grant chaos
2. Implement simple tracking systems
3. Align program and finance workflows
4. Prioritize effectively under pressure
5. Reduce last-minute stress



# Stress & Reflection

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What creates the most stress in your current grant workload?

# Why Coordination Breaks Down

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- Programs move fast
- Finance needs documentation
- Leadership wants summary updates
- Grants sit in the middle

# Why Grants Feel Chaotic

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- Scattered information
- Unclear ownership
- Reporting surprises
- Budget misalignment
- Reactive prioritization

# The Cost of Chaos

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- Late submissions future funding
- Budget errors damage creditability
- Burnout increases turnover
- Reactive work consumes strategic time

Chaos is not just stressful—it's expensive.



# The Reality of Overlapping Grants

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- Different funders, different rules
- Multiple reporting cycles
- Budget complexity
- Program + Finance + Leadership coordination changes
- Urgency stacking effect

# The Grant Triage Framework

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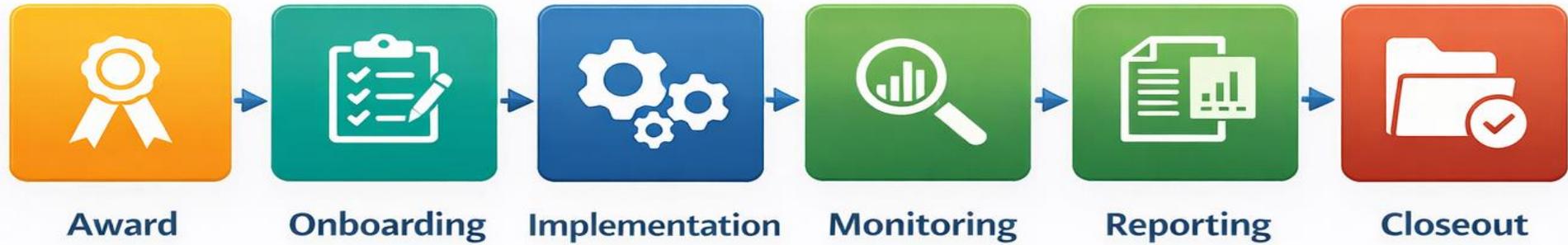
When everything feels urgent, sort by:

- Compliance
- Financial impact
- Funder relationship importance
- Deadline proximity



# Grant Lifecycle

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# The Good News

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- Multiple grants mean growth and trust
- Complexity is manageable
- Strong systems reduce stress
- Chaos is not inevitable



# Internal Grant Kickoff Meetings

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Every new award should include:

- Scope review
- Budget walkthrough
- Reporting expectations
- Role clarity
- Documentation process



# The Shift: From Reactive to Predictable

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## Reactive Model:

- Scramble before deadlines
- Last-minute data requests
- Budget confusion

## Predictable Model:

- Clear dashboard
- Scheduled check-ins
- Built-in buffer time

# Why Centralization Matters

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Every organization needs one central system that tracks  
Column should include:

- Grant name
- Funder
- Award amount
- Grant period
- Reporting frequency
- Next report due (narrative/financial)
- Reconciliation date
- Special conditions
- Subrecipients
- Match requirements



# Reporting Calendar Structure

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- Monthly internal review
- Quarterly financial check-in
- 60-day pre-report preparation trigger
- 30-day draft completion deadline

Deadlines should never surprise you.

# Technology Options

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- Excel or Google Sheet dashboards
- Task tracking software
- Shared reporting calendars
- Accounting software integration

Tools do not have to be expensive.

# Color Coding & Visual Priority

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## Use Color Coding

- **Red**-Due within 30 days
- **Yellow**-Due within 60 days
- **Green**-On track
- **Blue**-New award onboarding

Visual systems should reduce cognitive overload.



# Align Program and Financials Early

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Successful coordination includes:

- Shared budget review at award start
- Monthly spending check-ins
- Quarterly burn-rate analysis
- Clear documentation expectations

Alignment prevents crisis later

# Real Examples of Misalignment

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- Hiring before budget approval
- Spending in wrong cost category
- Not tracking match properly

# Budget Tracking Without Guesswork

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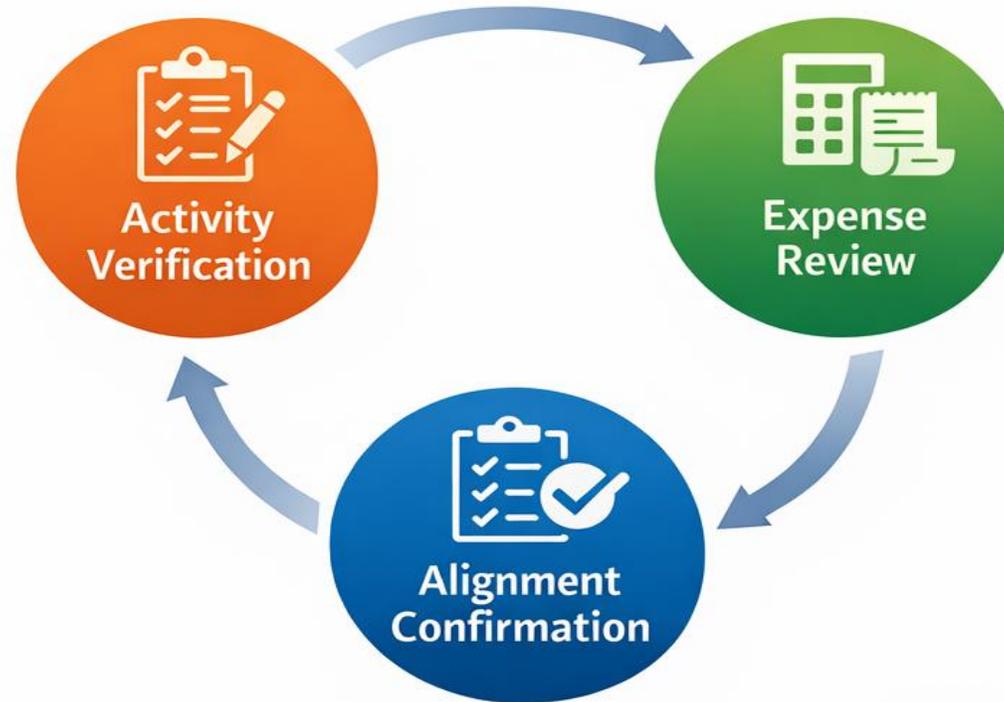
Create a monthly reconciliation rhythm:

- Program verifies activities
- Finance verifies spending
- Grants confirms alignment with budget narrative
  - Actual vs. projected spending
  - Personnel allocation
  - Restricted vs. unrestricted costs
  - Underspending and overspending s

Early adjustment = Stability



# Budget Tracking Without Guesswork



## Burn Rate Formula

$$\text{Burn Rate} = \frac{\text{Actual Spend}}{\text{Total Grant Amount}}$$

## Grant Period Progress Targets

-  25% Stage: 25% of Budget Spent
-  50% Stage: 50% of Budget Spent
-  75% Stage: 75% of Budget Spent

# Ownership Matrix (RACI Model)

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For every grant deliverable, define:

- **R**esponsible
- **A**ccountable
- **C**onsulted
- **I**nformed

Especially for:

- Financial reports
- Narrative reports
- Budget modifications
- Compliance documentation



# The 30-Minute Stability Meeting

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## Agenda Template:

- Reports due in next 60-90 days
- Budget status review
- Burn rate check
- Deliverable progress
- Risk flags
- Leadership updates needed

## Considerations:

- Who attends?
- Is this a standing recurring meeting?
- Who should be prepared in advance?
- What gets documented?

Consistency prevents emergencies



# Documentation Discipline

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Standardize folder structure:

- Award agreement
- Approved proposals and budgets
- Amendments
- Submitted reports
- Financial reconciliations
- Correspondence
- Deliverable evidence
- Closeout documentation

Good documentation shortens audits and onboarding.



# The 30/60/90-Day Planning Model

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Each month:

- Review reports due in 90 days
- Identify prep tasks
- Identify potential bottlenecks
- Adjust workload distribution
- Build internal draft deadlines

Forward planning creates breathing room. Deadlines should never surprise you.



# Buffer Strategy

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- Draft complete 2 weeks before the due date
- Finance review 10 days prior
- Final review 3 days prior

Build calm into the process.

# Closeout Is Where Many Grants Fail

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Many organizations scramble at closeout:

- Final financial reconciliation
- Equipment inventory
- Final narrative alignment
- Documentation retention checklist



# Warning Signs You Need A System Reset

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- Frequent reporting scrambles
- Budget corrections after submission
- Program unaware of spending limits
- Finance surprised by restricted funds
- Leadership receiving last-minute updates

These are structural issues—not personal failures.

# Capacity Reality Check

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If stress persists despite structure:

- Too many funders?
- Misaligned budgets?
- Understaffed compliance?
- Lack of automation?

Systems solve most problems. Capacity solves the rest.

# What Leadership Needs (But Does Not Say Clearly)

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- High-level dashboard summaries
- Risk flags early
- No surprises
- Clear financial projections

This helps frame the grants office as strategic, not administrative.

# Key Takeaways

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- Multiple grants signals success
- Chaos is a systems issue
- Centralization reduces stress
- Early alignment prevents crisis
- Align program and finance early
- Risk-based prioritization improves clarity
- Structure builds calm and control
- Build buffer time into everything



# Quick Reflection

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What is one system you need immediately?

# Lunch and Learn Series

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**Next Offering**

**Grant Management is Risk Management**

**April 14, 2026**

**12:00 noon – 1:00 p.m.**

# Are You Interested in Future Continuing Education Offerings?

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