

## Attachment A: New Grant Director's Checklist

\_\_\_ When the grant is funded, immediately send a copy of the grant award notification, complete original proposal, and complete grant guidelines to the Director of Financial Services, Director of Human Resources, Department Chair, Dean of the Division, and Director of Grant Initiatives

\_\_\_ Send a copy of the language to be used in citing the sponsor to Communications and Marketing along with the grant award notification so the office can develop a press release

\_\_\_ Re-read the proposal that was submitted, read the entire grant award notification and any citations in the notification, and read any other guidance provided by the sponsor on managing the award

\_\_\_ Review the grant deliverables, activities, milestones, objectives, outcomes and the original proposal timeline; post the dates of all deliverables and activities on your calendar

\_\_\_ Post interim and final report deadlines on your calendar; review reporting requirements and plan how you will meet the report deadlines; schedule time in advance to prepare the programmatic reports; the Business Office will prepare financial reports

\_\_\_ Touch base with your program officer to introduce yourself; find out if there are any issues the officer would like you to be aware of; ask what the officer's preferred method of communication is and frequency of communication

\_\_\_ Pay close attention to any email notifications from your program officer; these are official notices; keep copies of all emails and communications with your program officer to be incorporated into the official grant files which must be retained for six years

\_\_\_ Attend all trainings provided by the sponsor for managing the award and any other any other sponsor-recommended or required professional development opportunities

\_\_\_ Schedule a grant kick-off meeting with Director of Financial Services and staff, Director of Grant Initiatives, Director of Human Resources (if staff will be hired), the Chair, the Dean, and other department heads whose departments will be involved with the grant

\_\_\_ Coordinate with the Business Office to set up the grant account and to obtain guidance on expenditures so you comply with all campus purchasing requirements

\_\_\_ If you will be hiring staff, provide job descriptions to the Director of Human Resources and coordinate with her or her staff to post jobs following campus hiring procedures

\_\_\_ If you need to hire a consultant or independent contractor, coordinate with the Business Office to develop a contract and retain the consultant

\_\_\_ If you are working with an outside evaluator or an internal evaluator, set up a start-up meeting with the evaluator to begin the evaluation process; identify information required by the evaluator and a timeline for submitting data to evaluator; coordinate throughout the grant year with the evaluator to ensure s/he has the information required

\_\_\_\_\_ Purchase supplies and equipment at the beginning of the grant period of performance; all supplies and equipment must be needed to meet the program objectives and outcomes and should not be purchased after outcomes are met

\_\_\_\_\_ Pull together the team of individuals who will be working on the grant and schedule meetings with them; review the timeline for completing activities and assign tasks to the team; be sure team members understand their roles and responsibilities for carrying out activities and meeting outcomes

\_\_\_\_\_ Provide monthly reports to your Chair and Dean on the progress of the grant including what activities have been completed, milestones reached, and deliverables produced; discuss what you will accomplish in the following month

\_\_\_\_\_ Save documentation of all activities and services provided; this might include sign-in sheets for workshops and workshop flyers, counselor case notes, student sign-in sheets; consider how you will prove to the sponsor that you carried out the activities you proposed and create a paper trail; this documentation can be included in interim and final reports and will be useful in an audit

\_\_\_\_\_ Connect with Institutional Research to provide them with dates by which you will require student outcomes data for reporting; be sure to provide them with a schedule of deadlines as soon as the grant is awarded so that they can arrange to complete the work

\_\_\_\_\_ Prepare and submit interim reports to the sponsor showing adequate progress toward meeting outcomes; send a copy to your Chair or Dean, the Business Office, and the Director of Grant Initiatives

\_\_\_\_\_ Consider progress in meeting outcomes and evaluate whether you need to adjust your program to meet outcomes for the program year; only make changes that are allowable without the program officer's prior approval; obtain the program officer's approval for changes that require it

\_\_\_\_\_ Spend down all grant funds by the end of the program year; coordinate with the Business Office to be sure you are on track to spend down all funds

\_\_\_\_\_ Complete all proposed program activities and services by the end of the grant year; meet program outcomes proposed by the end of the grant year

\_\_\_\_\_ Obtain data from Institutional Research on program outcomes for the final report

\_\_\_\_\_ Prepare the final report for the grant year; submit to the Chair or Dean for review or the Director of Grant Initiatives for feedback

\_\_\_\_\_ Prepare and submit the final annual report to the sponsor indicating outcomes were met; send a copy to your Chair or Dean, the Business Office, and the Director of Grant Initiatives; the Business Office will prepare the final financial report

\_\_\_\_\_ Repeat the process above for multi-year grants

\_\_\_\_\_ Work with the Business Office on grant close-out in the final year of the grant award

\_\_\_\_\_ Submit all grant files to the Director of Grant Initiatives for official campus records; records will be retained for six years in compliance with federal requirements; arrange for the storage of confidential student records