

Kickoff Checklist

This checklist is to be completed during the first 30 days of the announcement of award. This document will become part of the permanent file in the Grants Management office. The Grants Management Coordinator will work with the Project Director and Grants Accountant to assure the specific requirements of the project are followed, tracked appropriately, reviewed on a regular basis. Shortfalls and/or potential compliance issues will be brought to the attention of the Project Director, Dean/AVP, and senior management.

Grant title:
Project Director:
Project Team:

Resource Development	Action	Completed
	Process award document	
	Congratulatory Letter from Dr. LoBasso for each team member	
	Grants Management Handbook	
	Federal/state Regulatory Guidelines	
	Grant Kickoff Summary	
	Grant Timeline (if in proposal)	
	Programmatic Reports	
	Evaluation, if required	
	Institutional Review Board application	
	Renewal dates and procedures	
	Verify contact person/program officer	
	Subrecipient agreement/contractual services	
	Time and effort reporting for all appropriate personnel (if required)	
	Award budget amendments	
	Award closeout/No-cost extension options	
	Records retention policy	
Grants Accounting		
	Grant period/Subfund(s) created	
	Grant Budget PeopleSoft setup	
	Budget amendments/transfers	
	Budget Overview – training	
	Fiscal reports – budget, trial balance, grant required	
	Match requirements, Indirect costs recorded	
	Funds drawdowns, track unobligated/rollover funds	
Human Resources		
	Any appropriate HR/College forms	
	Staff/hiring – Staffing Recruitment Request/Employee Action Form/Job Descriptions	
	TS Staffing – temporary employees	
Purchasing/Accounts Payable		
	Requisitions/Purchase orders – training	
	Equipment needs / order ASAP	

	Technology needs/ order ASAP	
	Travel procedures - training	
Marketing		
	Press Releases	
	Internet/Intranet News	
	Falcon Central	
	Website/Portal	
	Promotional Materials/Brochures/Flyers	
Facilities		
	Offices, classroom	
IT Services		
	Email, Computer, Phone, etc.	