

Grant Launch Checklist: Setting Up for Success

This checklist provides a structured approach to launching a grant-funded project effectively. While not all tasks may apply to every award, this tool serves as a guide to ensure key components are considered during the startup phase. Adhering to grant requirements, institutional policies, and compliance regulations is important to the successful implementation of grant activities. Proper planning, financial oversight, and clear communication will help mitigate risks, ensure compliance, and maximize the impact of the funded project.

Task	Guidance	Team Notes
Pre-Launch		
Review the Grant Agreement	Carefully read and understand the terms, conditions, and requirements outlined in the grant agreement.	
Assign Roles and Responsibilities	Clearly define roles and responsibilities for each team member involved in the grant implementation.	
Establish a Project Timeline	Develop a project timeline or schedule that outlines key milestones, deadlines, and deliverables.	
Set Up Grant Management Systems	Implement systems for tracking finances, reporting, and project management.	
Confirm Matching or Cost-Share Requirements	If the grant requires cost-sharing, ensure that matching funds are secured and documented appropriately.	
Verify Subrecipient Agreements/MOU's.	If working with subrecipients, partners, or contractors, establish and document agreements.	
Financial Management		
Create a Budget	Develop a detailed budget, aligning it with the grant award and any specific budgetary requirements outlined in the agreement.	
Budget Monitoring	Implement processes for monitoring expenses and ensuring that they align with the approved budget.	

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Project Implementation		
Kick-Off Meeting	Hold a kick-off meeting with the project team to discuss project goals, timelines, and expectations.	
Create Project Manual	Create detailed manual that outlines internal controls, workplan (tasks responsibilities), procedures and deadlines for each phase of the project.	
Develop Performance Metrics	Define key performance indicators for tracking project progress.	
Procurement and Purchasing	If applicable, establish procedures for procurement, purchasing, and contracting in compliance with District policies and grant requirements.	
Reporting and Documentation		
Reporting Schedule	Set up a reporting schedule, including due dates for interim and final reports, and assign responsibilities for report preparation.	
Data Collection and Documentation	Implement systems for collecting and documenting project data, outcomes, and impact according to grant reporting requirements.	
Track Time and Effort Reporting	Ensure compliance with effort reporting requirements for personnel paid by the grant.	
Communication and Collaboration		
Develop a Communication Plan	Outline how progress will be communicated internally and externally.	

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Engage External Partners	Set up collaboration meetings with external stakeholders if applicable.	
Evaluation and Monitoring		
Monitoring Plan	Develop a monitoring plan to track project progress and make necessary adjustments to ensure goals are met.	
Evaluation Plan	Establish an evaluation plan that outlines how project success will be measured and evaluated.	
Sustainability and Continuation		
Sustainability Planning	Develop a plan for sustaining project outcomes beyond the grant period, if applicable.	
Identify future funding opportunities	Begin researching and identifying potential future grant opportunities to support ongoing efforts.	
Risk Management		
Risk Assessment	Identify potential risks and challenges that may arise during project implementation and develop mitigation strategies.	
Establish a Contingency Plan	Develop strategies to address unexpected delays or funding adjustments.	
Compliance and Reporting		
Review Federal/State Regulations	Ensure awareness of all applicable grant-related laws and regulations.	

Task	Guidance	Team Notes
Compliance Checklist	Create a checklist of compliance requirements specified in the grant agreement and regularly review it to ensure ongoing compliance.	
Document Progress and Challenges	Maintain a project journal or log to document progress, challenges, and lessons learned throughout the grant period.	
Training and Capacity Building		
Conduct Grant Orientation for New Staff	Ensure new team members are trained in grant-specific policies.	
Team Training	Develop professional development calendar for team members to enhance their skills and knowledge relevant to the grant project.	