

Project Director Responsibilities Checklist

To Do		
<input type="checkbox"/>	Read all grant documents carefully (RFP, Proposal, Award documents) If Award documents require a signature contact the GCO.	Grant agreements and contracts can only be signed by the AOR, the College Provost for Operations and must be reviewed by Legal Affairs.
<input type="checkbox"/>	Open financial account (Qual) by sending a copy of the approved budget, Board Item, and Award documents to the RAM department.	Contact Assistant Controller of RAM for assistance. Spend funds according to budget.
<input type="checkbox"/>	Create a shadow budget to track expenditures for comparison to Odyssey records.	Keep accurate back-up for all expenses.
<input type="checkbox"/>	Set up a Kick-Off meeting appointment with the GCO.	Review Grants Quick Reference Guide.
<input type="checkbox"/>	Contact your Program Officer and introduce yourself.	Thank them for the funding. Acknowledge the receipt of the grant documents. Establish a cordial relationship.
<input type="checkbox"/>	Complete the Potential Conflict of Interest Reporting Form for Grants and ensure completion by all employees involved with the grant.	Form is located in the Grants Quick Reference Guide on page I-48
<input type="checkbox"/>	Contact HR to post positions if employees need to be hired.	Budget must first be set up in ODYSSEY.
<input type="checkbox"/>	If your grant includes a subrecipient, contact Legal Affairs to create a subaward agreement.	Make sure to monitor subrecipients as described in Grant Award Guide.
<input type="checkbox"/>	If a press release or other form of media dissemination is required, contact the Office of Communications.	Most press releases must be approved by the funder prior to release.
<input type="checkbox"/>	Look up funder's whistleblower policy and inform grant employees. Locate funder's OIG office website and, if available, download a sample poster with anonymous reporting information. Display it in a conspicuous place in your office and where program services are provided, if possible.	If funder does not have a policy, contact GCO for sample poster to display.
<input type="checkbox"/>	Define tasks and develop the work plan. Set up a timeline for all deliverables including reporting and input into your Outlook calendar.	Assure that the scope of work and deliverables are completed in a quality manner, on time, and within budget.
<input type="checkbox"/>	Set up program records and participant files. Participant files must be kept confidential and in a locked location.	Follow guidelines in the Grant File Inventory Form.
<input type="checkbox"/>	If your grant has an evaluation component, coordinate the evaluation of the project.	Find an external evaluator or contact the Office of Institutional Research and Effectiveness for internal assistance. Contact Purchasing in case External Evaluator needs to go through a formal bid process.
<input type="checkbox"/>	Contact the Purchasing Department prior to making purchases for your project.	Equipment and supplies must be part of the funder approved budget.
<input type="checkbox"/>	Prepare progress and performance reports by the deadline and in the format required by funder.	Reports must be approved by your direct supervisor and reviewed by the GCO prior to submission.
<input type="checkbox"/>	Contact RAM to initiate budget reports.	Financial reports are submitted by the RAM department.
<input type="checkbox"/>	Review Odyssey budget status reports monthly.	Use your shadow budget to reconcile expenditures.
<input type="checkbox"/>	Changes in the budget, key personnel, and program scope or timeline require prior approval from the agency.	This type of modification must be reviewed by the CGO and approved by RAM after discussion with your supervisor and before submission to the agency.
<input type="checkbox"/>	Contact the GCO and Assistant Controller for RAM 60 days before the end of your grant project.	The final reports will be a collaborative effort between you and these offices.
<input type="checkbox"/>	Contact HR if your grant project period is closing.	HR will assist with personnel issues.