# Award Kickoff Checklist - DRAFT

**Award Details:**

**Award Title:**

**Begin Date:** ___________  **End Date:** ___________  **Extension Date(s):** ___________

**Sponsor:**

**Project(s):**

**CON____________________**  **Agency Fund________________**  **Parent □  Child □**

**Project Team:**

**PI :** _______________________________  **Phone:** ___________  **Email:** ___________

**PI :** _______________________________  **Phone:** ___________  **Email:** ___________

**CoPI(s):** _______________________________  **Phone:** ___________  **Email:** ___________

**CoPI(s):** _______________________________  **Phone:** ___________  **Email:** ___________

**SPA Grant Administrator:** _______________________________  **Phone:** ___________  **Email:** ___________

**SFR Grant Accountant:** _______________________________  **Phone:** ___________  **Email:** ___________

**Dept Grant Accountant:** _______________________________  **Phone:** ___________  **Email:** ___________

**Certified Approver:** _______________________________  **Phone:** ___________  **Email:** ___________

**Effort Coordinator:** _______________________________  **Phone:** ___________  **Email:** ___________

**Other Dept Contacts:** _______________________________  **Phone:** ___________  **Email:** ___________

**Notes:**

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**GRANT ACCOUNTING IMPORTANT DATES:**

*(put these on the calendar now)*

**When are financial reports due?** ___________

**When is the final report due?** ___________

**When are IACUC, IRB protocol renewals required?** ___________

**What are the sponsor deadlines for budget changes or extension approvals?** ___________

**How does PI want to jointly monitor the project?** ___________

**Reporting frequency to PI?** ___________  **By whom?** ___________

**When are sub reports due?** ___________
**Discussion Checklist w/ PI**

- KNOW REQUIREMENTS  (Review university and sponsor requirements as they pertain to the project)
- KNOW BUDGET RESTRICTIONS  (Review NOGA, budget revision process)
- NOTE IMPORTANT DATES  (see Previous Page)
- DATA PLAN  (Confidentiality & Security)
- MATERIAL TRANSFER AGREEMENTS (data sharing): Will you need MTARF assistance?
- KNOWN SPECIAL EXPENSES?
- RCR REQUIREMENTS
  - ANIMALS: IACUC protocols & Research Animals Resource requirements "Titles must match"
    Protocol #: ____________________________  Titles#: ____________________________
  - HUMAN SUBJECTS: IRB protocols & human subject requirements "Titles must match"
    Protocol #: ____________________________  Titles#: ____________________________
- INTELLECTUAL PROPERTY: Are there contractual issues of who will own IP? Will project create IP with future monetary gains?

**PLEASE DESCRIBE THE CURRENT PLANS**

- HR Plans  (Who are you hiring? When will they begin? What are you paying that person to do? Salary cap? Are there export control restrictions? Fringe rates (academic year, summer)?)
- EFFORT  (Who is updating salary distribution? HSAs? Who will contact Effort Coordinators in other departments?)
- COST SHARE / MATCH  (Fund allocations, distribution set ups, combo code set ups, monitoring, does the program function mirror the project function?)
- TRAVEL  (Review updated travel policies, double-check sponsor budget restrictions)
- PURCHASING  (Equipment (bid? Sole source?), p-card requests & reconciliation process, requisitions)
- CONSULTANT / PROF SERVICES  (Statement of Work, Data collection, travel reimb, start/end dates, other expenses)
- CLINICAL TRIALS: What is anticipated?
- SUBAWARDS  (Budget, sub scope of work, schedule of reports, invoice process, Fair & Reasonable Cost Analysis Forms I & II (Federal---see subaward toolkit on SPA.)
- PREAWARD EXPENSES /AWARD SETUP DELAYS: need to move expenses? Justifications?
- CONTRACT MODIFICATIONS: key personnel, subawards, rebudgeting, NCE, etc.?
As Project Ends...

◊ Monitor salary obligations, set up end dates in Payroll
◊ Make plans, if appropriate for personnel to be moved to a new project on which they will be working
◊ Purchases in the last 60 days of the project period should be reviewed closely for possible disallowances.

  Purchases within the last 60 days of a grant period are a known risk indicator communicated by auditors. If an item must be purchased within 60 days from a project's end, it is recommended that the purchase be encumbered and the justification for the purchase explain the reason for the timing.

◊ Has PI confirmed all collaborators/subs have completed their work and invoiced the university within their time frame.
◊ Close down p-cards? Contact the Department card administrator.
◊ Move or stop demurrage and ISO charges
◊ Close purchase orders, remove encumbrances
◊ Ensure all travel has been completed and reimbursed
◊ Work with PI to determine where capital equipment goes – Return?
  Request transfer of title?
◊ Fund cost share requirements (JE)
◊ Work with SPA to close subawards
◊ Stop spending against project by the end date
◊ Work with SFR to complete the final financial report on time