Generic Master Task List for Grants
December 2008

#	Task	Now doing?	• Must do? • Should do? • Stop doing?	Primary Responsibility	Secondary Responsibility	Suggestions/ Comments
1.	Provide vision and leadership on desired projects. Need not specify source of funding.					
2.	Identify sources for new grants & assess "Organizational Fit" such as: • Program purposes • Match requirements • Eligibility reqs. • Time frames • Expenditure and reporting reqs. Task includes researching opportunities & what's been funded elsewhere.					

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3.	Notify Organizational units/division of grant opportunities • E-mail • On-Line Databases					
4.	Notify other courts of grant opportunities.					
5.	Notify other agencies of grant opportunities					
6.	Develop project concept requirements (preliminary scope and budget) to determine if grant should be pursued					
7.	Present grant concept for approval by Authorized Official/Agency Head					
8.	Approve continuation of grant application process					
9.	Commit resources to grant development (individual or team efforts)					
10.	Develop budget and narrative (scope of work) for grant					

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11.	Develop SWOT Analysis/Risk Assessment (impact on Organization)					
12.	Complete final application (includes Gantt chart, project plan)					
13.	Perform final review including checklist of required items – are all components completed, do budget numbers add up?					
14.	Signed/Approved application					
15.	Submit application					
16.	Follow up on status with granting agency					
17.	Receive notice of funding (or alternate funding)					
18.	SWOT Analysis/Risk Assessment Revisited (ongoing)					Strengths/Weaknesses/ Opportunties/Threats

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19.	Review and negotiate terms of grant, provide additional info, follow up on status with granting agency					Is there a single point of contact in your agency?
20.	Accept grant					
21.	Code grant in financial system					
22.	Review grant requirements with implementation team					
23.	Initiate contracting process					
24.	Maintain financial ledgers & billing/audit files for grant (Send copies to agencies)					
25.	Reconcile grant in financial system.					
26.	Approve purchase orders for grant purchases.					
27.	Maintain all contracts					
28.	Co-sign invoices and expenses to be charged to grants					

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29.	Receive from the inventory officer a receipt check-in form for all equipment purchased with grant funds – tag number.					
30.	Complete grantor agency forms for fixed assets if necessary.					
31.	Enter invoices in financial system					
32.	Respond to vendor requests for information about status of payments					
33.	Assess fund balances and project any fund lapses					
34.	If necessary, prepare budget amendments /time extension requests					
35.	File financial reports					
36.	File program reports					
37.	Prepare and disseminate monthly fiscal reports about grant balances to project managers					

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38.	Prepare requests for state agency or federal reimbursements					
39.	Manage entire grant fund – make sure cash flow among various grants is maintained					
40.	Track progress of grant and its sub-contracts and notify authorized officials					
41.	Inform management of issues in grant tracking					
42.	Prepare state/county/city budget narratives and Form's for appropriation authority					
43.	Prepare annual reports – CAFRA [anticipated revenues] & state/local audit report [all federal funds]					
44.	Coordinate and administer inter-agency agreements for receipt & expenditure of grant funds					

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45.	Maintain working relationships with federal, state & local officials involved with coordinated grant programs					
46.	Wrap-up tasks: Prepare final reports and other actions required by grantor, such as disseminating reports to State Justice Institute (SJI) libraries and websites and producing press releases					
47.	Develop scope for contracts for independent evaluations of grant programs					
48.	Develop the actual contract					
49.	Perform internal evaluations if necessary					
50.	Provide technical assistance to courts in the application, programming & fiscal reporting/administration of grants					

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