



NSF ATE Grant Management Timeline and Checklist

	ACTIVITIES	WHEN	RESPONSIBILITY	COMMENTS
FIRST THINGS	Notify college administration and public relations office	Upon receipt of award letter	PI	Notify the PI's supervisor. Supervisor may want to notify other college administrators; if not, PI notifies key administrators including the President. Each administrator can help with successful implementation of grant goals. (See Roles and Responsibilities for suggestions.) Give PR the award notification and the project summary to create press releases.
	Notify all Co-PIs, Senior Staff and Evaluator of the award and schedule project leadership meetings	Upon receipt of award letter	PI	Schedule the first monthly leadership meeting of the PI and Co-PIs and agree on subsequent schedule. If an evaluator was not named in the proposal, the Grants Accounting Office can help you find one through your college procurement office.
	Notify Business Office - Grants Accounting and schedule an introductory meeting	Upon receipt of award letter	PI	Working with the college's Grants Accounting Office is integral to success; no subawards or contracts are issued until the Grants Accounting Office has set up the chart of accounts for the grant. (Be aware that the college chart of accounts may not directly mirror the NSF budget line items.) Determine the format and schedule in which the Grants Accounting Office will provide the PI with the record of expenditures and remaining budget.
	Meet with Grants Accounting Office	Within 3 weeks of receiving award letter	PI & Grants Accounting	Go over the budget for everyone in the grant and seek assistance to get subawards completed and sent out for signature as well as contracts out to contractors. Note that if a person is actually named in the proposal,

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			typically a sole source contract can be awarded, but the Grants Accounting Office should confirm this approach.
Hold first Project Leadership Meeting	Within the first 4 weeks	PI, Co-PIs, Evaluator	<p>Suggested Agenda:</p> <ul style="list-style-type: none"> • Set up regular leadership calls/web meetings • Determine or confirm responsibilities for project tasks as stated in the grant proposal • Discuss financial document processing based on what the Grants Accounting Office requires (e.g. how do subawardees and contractors – if part of the leadership team – get paid/reimbursed?) • Develop action items and responsibilities for them for work to be accomplished before the next meeting
Develop Draft Statements of Work for all subawardees and contractors	Within the first 4 weeks		For each subawardee and contractor, develop a clear statement of expectations of what will be done, when it will be done, and how it will be done. Require brief written reports quarterly and also at least one month before the annual report is due. Provide a schedule of invoice due dates. Note that project team members from subawardee colleges may not be able to work with you until their subaward is approved.
Notify other appropriate faculty and colleagues	Within the first 4 weeks	PI	It is important that other faculty and/or staff know about the project so they can support it. Email works fine for this function, but a presentation at a faculty meeting will deepen their understanding.
Set up and begin to report Time and Effort for the work of the grant	Within the first 4 weeks	PI & Grants Accounting	Work with the Grants Accounting Office to ensure that Time and Effort reporting forms are filled out weekly and filed monthly for everyone who is paid by the grant at the college. If the college does not have a T&E form, consider using one like the examples provided by the NSF, here and here.

MONTHS 1-2	Notify external stakeholders if they have not already been notified	Within 4-6 weeks of receiving award letter	PI	Notify employer/business partners, workforce boards, and other key stakeholders or partners about the grant and schedule opportunities to meet with them to get them involved.
	Receive subawards and contracts from the Grants Accounting Office for review	Within 4-6 weeks of receiving award letter	Grants Accounting	Review documents upon receipt so that Grants Accounting can send them for signature by subawardees and contractors. Often, the contributors to the grant cannot begin work until they are under subaward or contract.
	Set up project plan in Excel or a Project Management software system	Within 4-6 weeks of receiving award letter	PI, possibly with help from others	The project plan and task completion can be documented using Excel or project planning software. Document accomplishments after each leadership call or major activity.
	Email and phone the NSF project officer	Within 2 months of receiving award letter	PI	The purpose of this touch-base is to get to know the program officer. They want you to be successful!
ONGOING	Meet with evaluator	Monthly after evaluator contract is issued	PI	At the first meeting, discuss how the evaluator will access college data for the evaluation report. The evaluator must submit their annual report to PI no later than 4 months prior to annual grant anniversary since the annual report becomes due 90 days before the grant anniversary date. Note that the evaluation report must be filed with the annual report through research.gov .
	Meet with each contractor	Regularly but on schedule that is appropriate	PI	The PI monitors contractor progress through regular check-in meetings, unless they already report this at leadership meetings.

DO NOT WAIT	Log into Research.gov to obtain the latest format and download the template for the annual report	Within 3 months of receiving award letter	PI	This may seem early, but it is important to know what will be expected in the annual report so that data can be collected all year.
	Gather data for annual report from Co-PIs, subawardees and contractors	Ongoing; begin by 3 months of receiving award letter	PI	Begin to write the annual report. Guidelines for that report will be available.
	Draft Annual Report	By 7-8 months of receiving award letter and every 12 months thereafter	PI	The first annual report is due 9 months from award date. The draft of first annual report should be complete and ready for review by Co-PIs by month 7 or 8. Subsequent annual reports are due at 12-month intervals after the first project anniversary and should be ready for review by months 10 or 11 each project year. Note: The annual report becomes due 90 days before the grant anniversary date and is considered overdue by the anniversary date. Remember that the evaluation report must be filed with the annual report as an attachment.
ATTENDANCE REQUIRED	Attend HITEC conference	Late July annually	PI + others	Participation and travel are usually provided through the grant award. Watch for the request for submission of presentation proposals, typically issued in late November - January prior to conference.
	Attend the PI conference	Late October annually	PI + 1	Participation and travel are provided through the grant award. Funded participation is limited to 2 attendees unless the conference is held virtually. Watch for requests for submission of presentation proposals that comes out the summer before the conference.