

## GRANT CLOSEOUT SCHEDULE & ACTIVITIES

College Relations & Advancement  
2019/2020

Contact:  
Grants Manager  
Bonnie Day  
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Throughout the closeout process the Project Lead is responsible for ensuring that all activities are completed in a timely manner.

Use this checklist for closing out grants that will have some remaining influence on college programs or activities. This process requires careful staff planning and cross-department coordination; the Grants Manager will assist as needed to fulfill each activity.

What to expect:

- Institutionalizing grant-generated systems, programs, services, procedures, or staff positions (in cases where institutionalization either is required by the grant terms or is identified by the college as important).
- Disposing of or redirecting equipment, supplies, spaces, and furniture that will remain after the grant.
- Defining a process for maintaining program/project support after the grant period.
- Identifying and addressing procedures, services, programs, and tangibles that will not need to be continued after the grant ends.
- Completing narrative and fiscal reports required by the granting agency or other entities.
- Organizing and archiving grant records in accordance with federal, state, and institutional records management requirements.
- Conducting an assessment of grant-related successes, failures, and challenges to inform future college projects.



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Project Name		Project Lead	
Funding Agency		Grant Program	
Award Amount		Account #	Grant Period (start/end dates)

**Nine Months Before Grant Ends**

Time Frame Start – Completion	Activity	Activity Contact	Notes
	Review budget and forecast ending balance	Business Office, Grants & Operations Accountant	
	Confirm that all equipment purchased with grants funds is inventoried appropriately <b>and in accordance with grant requirements</b> , with all documentation and maintenance schedules on file	Maintenance Department Grant's affiliated Department Supervisor	
	Prepare a written plan for use of remaining office or other space(s), furnishings, equipment, supplies, and other tangibles that will remain at the college <ul style="list-style-type: none"> <li>• Confirm that inventory list is current and complete.</li> <li>• How long must inventory items be tracked?</li> </ul>	Business Office Administrative Services	
	Prepare a written plan for identifying procedures, programs, services, and partnerships that <b>will continue</b> after the grant <ul style="list-style-type: none"> <li>• identify the responsible institutional party and financial obligations for each item</li> <li>• Review the document with the appropriate vice president(s); may require additional review by President's Cabinet, specific committees, etc.</li> </ul> Identify in writing any procedures, programs, and services that <b>will not continue</b> after the grant <ul style="list-style-type: none"> <li>• Report to the appropriate vice president any specific issues or concerns related to their closeout</li> </ul>	Grant's affiliated Vice President(s)	
	Review staff positions and identify those slated for continuation and for termination	Human Resources	
	Notify the college at large that the grant will be ending; and communicate the institutionalization plan, personnel retention/departure plan, and other closeout activities affecting the college	College Relations & Advancement, Timber Talk Human Resources	

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<b>Six Months Before Grant Ends</b>			
Time Frame Start – Completion	Activity	Activity Contact	Notes
	Review budget and forecast ending balance	Business Office, Grants & Operations Accountant	
	Review project activities and forecast completion dates; <b>consider need for an extension or other post-grant activity</b> ; prepare extension request if appropriate	Grant's affiliated Department Supervisor	
	Notify Human Resources of upcoming personnel actions (continuations, terminations) and prepare for transitions <ul style="list-style-type: none"> <li>• Notify terminating staff of official last day; develop individual employee plan to use vacation time or for the director to budget payment from grant funds</li> <li>• Work with continuing staff to develop a transition plan; train staff who will assume specific ongoing tasks</li> <li>• Notify other college staff of plans for institutionalizing (absorbing or transferring) grant activities or duties</li> </ul>	Office of Human Resources Grant's affiliated Staff	
	Meet with external partners and review plans for continuation or termination of project activities <ul style="list-style-type: none"> <li>• Obtain feedback on or approval of plan for continuing activities and services, with designated responsible parties and timelines</li> <li>• Review alternatives, if appropriate, to terminating services or activities</li> </ul>	Grant's affiliated External Partners	
	Develop records consolidation plan in accordance with grant requirements and state archiving/records management requirements: Identify and begin sorting permanent records from extraneous copies, develop plan for purging files and recycling or archiving documents	Grants Manager	

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**Three Months Before Grant Ends**

Time Frame Start – Completion	Activity	Activity Contact	Notes
	Review budget and forecast ending balance	Business Office, Grants & Operations Accountant	
	Review project activities and forecast completion dates; <b>consider need for an extension or other post-grant activity</b> ; prepare extension request if appropriate	Grant's affiliated Department Supervisor	
	Review status of continuing and terminating staff, including staff vacation time usage and progress in training other college staff to assume ongoing tasks <ul style="list-style-type: none"> <li>Process necessary paperwork for staff transitions (continuing, terminating)</li> </ul>	Office of Human Resources Grant's affiliated Staff	
	Review requirements of final report <ul style="list-style-type: none"> <li>begin to assemble documentation and data</li> <li>Begin assessment of grant successes, failures, challenges, lessons learned</li> </ul>	Grants Manager	

**Two Months Before Grant Ends**

Time Frame Start – Completion	Activity	Activity Contact	Notes
	Complete and confirm final plans, schedule, and arrangements for disposition of continuing equipment, facilities, and supplies	Business Office Administrative Services	
	Notify staff of schedule for clearing offices, file cabinets, etc.	Grant's affiliated Staff	
	Begin drafting final report narrative, including internal assessment of grant successes, failures, challenges, lessons learned	Grants Manager	

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<b>One Month Before Grant Ends</b>			
Time Frame Start – Completion	Activity	Activity Contact	Notes
	Review budget and forecast ending balance	Business Office, Grants & Operations Accountant	
	Draft final report with place-holders for final data; if project director will terminate at the end of the grant, confirm responsible party for completing and submitting the final report to the granting agency	Grants Manager Grant's affiliated Department Supervisor	
	Complete any final paperwork for staff transitions	Office of Human Resources	
	Complete final grant activities		
	Complete internal report on grant successes, failures, challenges, lessons learned; submit report to Grants Manager and Direct Supervisor	Grants Manager Grant's affiliated Department Supervisor	
	Complete consolidation of long-term and permanent records and destruction of extraneous records; as needed, transfer retained records to Grants Manager	Grants Manager	
	Submit fully completed checklist, along with any necessary documentation or materials, to Grants Manager for final review	Grants Manager	