

Grant Kick-Off Checklist

PURPOSE

It helps ensure that programs are prepared to implement services and capture required information from the start. This checklist outlines key steps to set up a new grant, including:

- ▶ Organizing project teams
- ▶ Establishing data tracking systems
- ▶ Aligning workflows with reporting and evaluation requirements

Use Case

You have been awarded a new grant and need to organize your team, systems, and processes to ensure effective implementation, compliance with requirements, and readiness for future reporting.



ABOUT BSRI

BSRI was created to support informed and effective decision-making for our partners with tools, resources, and data for action. As we wind down operations, we are creating these resources for the community to continue the work. We use our guiding principles in engaging with partners and communities, putting people first through accountability and reciprocity, communicating transparently, and sharing our knowledge widely.

ABOUT THIS DOCUMENT

BSRI developed this checklist based on our experience supporting partners in launching new grants and navigating complex requirements. We've seen how much easier everything becomes when teams take the time to get organized up front. This tool is designed to provide a clear, practical starting point, helping you align roles, set up systems, and build a strong foundation for implementation, compliance, and continuous learning.

USE OF ARTIFICIAL INTELLIGENCE (AI)

Our organization utilizes artificial intelligence (AI) tools to enhance efficiency, support data analysis, and strengthen evaluation practices. We also encourage our partners and clients to thoughtfully explore AI as a means to build future-ready evaluation capacity. All AI use is governed by strict data privacy and ethical standards. We do not input any personally identifiable information (PII), protected health information (PHI), or other sensitive data into AI systems in a manner that would violate HIPAA or other applicable privacy regulations.

Additionally, we exclusively use licensed AI tools and platforms that explicitly prohibit the use of submitted data for model training or retention beyond the scope of the intended task. This ensures that all information remains confidential, secure, and protected.

HOW TO USE THIS RESOURCE

Step-by-step guide for organizing teams, systems, and workflows when a new grant is awarded

1. Understand the Grant Requirements and Define Program Plan

Review the grant requirements and translate them into a clear program plan. This step ensures your team understands what is expected, how it will be implemented, and how it will be measured. Tools like a logic model or evaluation plan can help organize this information and connect program activities to outcomes. Check out the BSRI logic model guide for more information.

Review the Notice of Award (NOA) and/or key grant documents. Keep an eye out for specific goals or targets (e.g., numbers), reporting formats or submission portals, and timelines. Pull out the following information into a new document or slide deck so you have a handy summary of the grant's purpose and goals, services or activities that will be provided, and the target population/eligibility criteria.

Define how success will be measured *for each* goal. Create a table or use a slide or Word document to clarify 1) What will be measured (e.g., participants served, completion rates), and 2) What success looks like (e.g., target numbers or percentages). Based on your success measures, determine what data must be collected and add it to the same table, deck, or document. Do this for each goal. For program-level grants, this often includes:

- ▶ Enrollment (who is served)
- ▶ Services delivered (what was provided)
- ▶ Outcomes (what changes over time)



Optional AI Support

You can use AI tools (e.g., ChatGPT) as a double-check when reviewing grant requirements. For example, you might paste relevant sections of the Notice of Award or reporting guidance into a separate document and ask: "What reporting requirements or data elements should I track?"

This can help you identify anything you may have missed. This should be used as a supplement, not a replacement, for carefully reviewing the original grant documents.

**Pro Tip**

Misunderstanding requirements early on often leads to reporting challenges later. Taking time to fully review and clarify expectations at the start will save time and reduce errors throughout the grant. If needed, contact the grant program officer or designated funder point of contact.

2. Establish Roles and Responsibilities

After defining your program plan and success measures, assign clear ownership for each part of the grant. This ensures activities, data, and reporting requirements are consistently managed. Designate a primary person responsible for the grant to oversee the grant's implementation and serve as the main point of coordination. This person is often referred to as the Project Director and is typically responsible for monitoring progress toward goals and ensuring reporting requirements are met.

Assign other key staff positions and functions by considering the flow of a participant through the program, who they will interface with for enrollment, service delivery, data collection, and discharge, if appropriate. Also consider administrative functions such as financial tracking and additional compliance documentation. Each area should have a clearly identified owner. Some grants require certain roles to be held by different individuals.

Define roles for partners or subcontractors (if applicable). This may include supporting partners in developing scopes of work or memoranda of agreement/understanding. If partners are responsible for implementing key aspects of your program, and are necessary for compliance and success, having a formal agreement in place is essential.

Document:

- ▶ What each partner is responsible for delivering.
- ▶ What data are they required to track or report.
- ▶ How and when they will share information with your team.

Establish communication and check-in expectations and cadences. Decide how often the team will meet (e.g., weekly, bi-weekly, monthly) and have a standard agenda that includes shared updates and documentation. Add these to the calendar now. Confirm access to systems and tools. Some grants require data entry or reporting to occur in specified portals that require accounts, user names, and

passwords. If this is the case, designate which staff members need access and secure their accounts. At a minimum, the Project Director should be able to access any required system.

3. Align Budget and Resources

Before building systems or beginning implementation, confirm that your program plan is realistic and supported by available funding and resources. Review the grant budget and any funding restrictions. Document them so the full team is aware.

Cross-reference the staff roles and responsibilities defined earlier are supported by available funding. Specifically identify which positions are funded and at what proportion (e.g., .5 FTE).

Confirm you have the necessary tools and materials to run the program. If you need to order supplies, identify what is needed (e.g., program materials, technology) and get the process moving forward to avoid implementation delays. Establish how expenses will be tracked in coordination with the fiscal person at your organization so you can effectively monitor spending throughout the grant.

4. Set Up Data Collection and Tracking Systems

Once you understand the grant requirements, set up simple systems to track the data and program updates needed for reporting. At a minimum, this should include a shared spreadsheet or database to track participant enrollment, services, and outcomes, along with a running notes document (See C below) to capture activities, successes, challenges, and key updates from meetings or check-ins. Ensure these tools are clearly named, stored in a shared location, and aligned with the grant's goals and reporting requirements so all required information is consistently captured.

Decide how you will track participants, services, and outcomes. Choose a tool that fits your program (e.g., a shared spreadsheet, database, or existing system) and ensure it can capture all required data identified in Step 1.



Need additional support with data structure?

For step-by-step guidance and examples on organizing, cleaning, and structuring your data, see our reporting checklist and data infrastructure starter guide, along with other resources found on our impact hub!

Establish a simple approach for tracking data and program updates over time, including who is responsible for maintaining the data and how information will be recorded and reviewed. Conduct a final review of your system against the NOA to confirm all required data, outcomes, and reporting elements can be captured consistently and the documents are accessible to relevant team members.

5. Monitor Implementation and Track Progress

Once your program begins, use your tracking system and documentation practices consistently to monitor progress, identify issues early, and ensure the program stays aligned with grant goals. At the beginning of implementation, record the baseline information you will use to measure progress over time. This allows you to pilot-test with a few participants to evaluate systems and staff roles/functions against your planned workflow.

Set up a recurring meetings to regularly review program data and progress toward goals. This may include the number of participants served, progress toward enrollment or service targets, and outcomes. Reviewing data consistently helps your team identify patterns, track progress, and stay aligned with program goals.

Discuss the findings with your team to understand what the data is showing and what it means for your program. Use these conversations to identify what is working well, where challenges are emerging, and what adjustments may be needed to strengthen implementation. Capture key insights in your running notes document to support ongoing learning and future reporting.

Use the data (numbers, staff feedback, funder feedback) to make improvements and document them. When possible, treat changes as small tests to see what works better, and continue refining your approach over time. Share lessons learned to support team learning and broader organizational improvement.



Questions to ask yourself

- What stands out in our data right now?
- Are there any patterns or trends we should pay attention to?
- What might be contributing to these results?
- Are there changes we want to test based on what we're seeing?