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PROJECT MANAGER: _____

Initials	Date Completed	Item	Supporting Documents	Notes
**Position 1 – Application/Award – Overall Grant Management**			
		1	Project File Table of Contents	
		2	Project Summary Form	*Completed by County Staff*
		3	Subrecipient Contacts and Org Chart	
		4	Subrecipient Application	
		5	Subrecipient Agreement – Exhibit A	
		6	Activity Eligibility Documentation – Income limits, area definition, rent limits	*Should be included in the Exhibits of the Agreement*
		7	Letters & correspondence with the County	
		8	Amendments	
		9	Subrecipient written procedures ➢ Grant management (Including eligibility documentation) ➢ Purchase and financial procedures ➢ Procurement policies & procedures	
		10	Subrecipient Proof of Insurance	
**Position 2 – Pre-Activity Delivery**			
		11	Environmental Review	*Completed by County Staff*
		12	Permits	*(depending on project/activity)*
		13	Sample of Subrecipient client intake form	
		14	Client profiles ➢ Race, Ethnicity, Income, Female Head of Household ➢ Proof of income eligibility: bank statement, tax return, income eligible program	
**Position 3 – Activity Implementation**			
		15	Ledger of eligible expenses	
		16	Payment requests including documentation of expenses ➢ Purchase Receipts ➢ Invoices ➢ Payroll records	
		17	Program Income Documentation	
		18	Single year audit	
		19	Quarterly progress reports	
		20	Final Completion Report	
		21	Affirmative Marketing Reports	
**Position 4 – Post Activity/ Monitoring**			
		22	Signed off permits	
		23	Recognition of project completion by city council, architect or engineer	
		24	Previous Monitoring Concerns/Findings	
		25	Active Monitoring Concerns/Findings	
		26	Monitoring Notification Letter	
		27	Monitoring Report Letter	

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