Donor grantee checklist – **SAMPLE**

- Verify participants on the version 1 of participant transfer spreadsheets and notify BCT
- Contact recipient grantee(s) to discuss mutual expectations for the transition process and begin planning
  - Confirm the date, time, and location of the participant transition meetings
- Identify and develop plan for participants whose individual durational limit (IDL) transition planning must be:
  - Completed by donor grantee alone
  - Done in coordination with recipient grantee
- Submit all outstanding data entry forms and swap request.
- Send letters to all participants and host agency managers and supervisors affected by the transition
  - Give details of the transfer process, including right of first refusal and individual durational policy requirements
  - Communicate date, time, location, and necessary documents for transition meetings
- Prepare packets of transition documents for each transferring participant. (Do not transmit this information until after the transition meeting, to ensure the information is current.) Each packet should contain copies – not original files – of the following:
  - IEP and most recent updates (e.g., case notes, training certification)
  - Community service assignment description, with length of assignment
  - Other relevant information (e.g., case notes, correspondence, and other documents as agreed to by the donor and recipient)
  - Payroll records
  - Summary of participants receiving paid training, paid sick, in-person CSA, remote CSA
  - Documents regarding one-stop MOUs and infrastructure payments
- Hold the participant transition meeting(s) jointly with the recipient grantee(s). Topics should include:
  - Purpose of the transition
  - Thanking participants for their service and long-standing support
  - Reassignment of participants to recipient grantee, including contact information
  - Participants’ continued community service with their current host agency for 90 days, until April 3, 2021
  - IDL policies and participants’ right to fair duration for 90 days
  - Changes in payroll: forms and documentation and pay dates
  - Timekeeping requirements: forms and submission
- Hold host agency transition meeting(s) jointly with the recipient grantee(s). Topics should include:
  - Purpose of the transition
  - Thank host agencies for their continued support

**Completion Date**

| Version 1 - October 30, 2020 | November 1, 2020 |
| Version 2 - November 25, 2020 | December 18, 2020 |
| Version 3 - December 18, 2020 | December 1, 2020 |
| November 22, 2020 | October 16, 2020 |
| December 18, 2020 | December 18, 2020 |
| December 18, 2020 | December 18, 2020 |
| December 18, 2020 | December 18, 2020 |
• Participants’ continued community service with their current host agency for 90 days, until April 3, 2021 December 31
• IDL policies and participants’ right to fair duration for 90 days
• Changes in payroll
• Timekeeping requirements

☐ Contact by mail participants who were not able to attend the transition meeting(s) and encourage them to contact you immediately for further information. January 1, 2021

☐ Transfer participant and host agency packets to the recipient grantee following the transition meeting(s) December 18, 2020