

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
Version 2 - November 25, 2020
Version 3 - December 18, 2020

November 1, 2020

December 18, 2020

December 1, 2020

November 22, 2020

October 16, 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