Grant meetings:

PI should be presented with:

Monthly reports

PI or lab manager should be looking at details to make sure charges have hit the correct account.

GM should be reviewing for waywards

PIs Master sheet (May vary by Dept)-

PI should review and make sure all effort they expect on fund managed by us and other departments is present

PI/lab manager should review to make sure all lab personnel are paid as they expect

GM should be discussing possible funding shortfalls/excesses, balances of grants, invoicing or cash issues, RPPR due dates, letting PI know 90 days before end date, prepping grants for closeout, sharing crucial information that GM feels PI should know

GM should be reviewing sheets to make sure PIs and lab members have been paid as indicated

GM should be correcting wayward with other departments or by correcting account in system that caused the fund to hit incorrectly

Responsibility of GM to make sure the PI understand the information being presented to them. Reviewing Master sheet in detail at least once or as many times as the PI wants until they are comfortable reviewing on their own. Should also review the monthly reports at least once or as many times as the PI needs until they are comfortable reviewing on their own

Meetings are lead by GMs but should be tailored to the PI. While the points above should be hit- the amount of detail needed or wanted should be dictated by the PI.