Research Support Overview and Refresher

1:00-1:10 - Welcome and Purpose

1:10-2:00 – Research and Pre-Award Support
  • CHSS Research
  • Research Development Services
  • Office of Sponsored Programs

2:00-2:35 - Post Award Support
  • CHSS Research Post Award
  • Office of Sponsored Programs

2:35-3:00 - Faculty Panel with Q&A
Research Support Overview and Refresher

• CHSS Research
  – Michele Schwietz, Associate Dean for Research
  – Brooke Gowl, Associate Director of Research Development
  – Jay Lee, Graduate Professional Assistant
  – TBD, Associate Director of Pre-Award Research Administration (search underway)
Research Support Overview and Refresher

CHSS Research (Michele)

✓ Leadership to support CHSS Research, Scholarship & Creative Works

✓ External funding development
   ✓ Sponsored research proposal approvals
   ✓ Coordination with CHSS Finance/Post award

✓ Research Leaders/Offices, Research Council
Research Support Overview and Refresher

CHSS Research (Michele)

✓ Research policies (e.g. F&A, fellowships, etc.)
✓ Internal Funding (FRDA, Faculty Study Leaves, Limited Submissions, etc.)
✓ Research Centers
✓ Getting ready for RAMP and CHSS Pre-Award Research Administration/Coordinate with OSP
Research Support Overview and Refresher

UNIVERSITY SUPPORT
- Research Development Services
- Office of Sponsored Programs

COLLEGE SUPPORT
- Department Chair and Administration
- CHSS Research
Sponsored Research Life Cycle

1. Pre-Award: Generating Your Idea
2. Pre-Award: Finding Funding Opportunities
3. Pre-Award: Proposal Development
4. Pre-Award: Proposal Submission
5a. Awarded
5b. Not Funded
6. Post-Award: Award Negotiation & Setup
7. Post-Award: Managing Your Award
8. Post-Award: Project Closeout

Grants Cycle
Research Support Overview and Refresher

- CHSS Research (Brooke)
  - Research development outreach and engagement
  - Proposal development
  - Research development resources
Research Support Overview and Refresher

• CHSS Research (Brooke)
  – Research development outreach and engagement
    • Sponsor Talks Series
      – OCT 7 - Introduction to International and Foreign Language Education programs in the Department of Education
    • Workshops
      – JUN 2021 NEH Summer Stipends Workshop
      – Spring 2022 - Grant Writing Workshop
    • Monthly CHSS Research Virtual Coffees (not recorded)

Recordings of events are housed on the CHSS Research Resources SharePoint site.
Research Support Overview and Refresher

• CHSS Research (Brooke)
  – Proposal development
    • Individual consultations to strategize
      – Discussion of research project ideas and potential sponsors
    • Funding opportunity search guidance
      – CHSS Digest Featured Funding Opportunities
  • Application reviews and editing
Research Support Overview and Refresher

• CHSS Research (Brooke)
  – Research development resources
    • CHSS Digest
      – https://chss.gmu.edu/newsletters/2
    • CHSS Website Research
      – https://chss.gmu.edu/research
    • CHSS Research Resources on SharePoint
      – https://to.gmu.edu/CHSSResearchSharePointssignup
Dear colleagues,

Welcome back to campus for fall semester 2021, and welcome to a new edition of the CHSS Digest.

Just as you’ve noticed some changes on campus, the newsletter is incorporating a few changes this year. For one thing, it’s going to be coming out twice each month; after this August “Welcome Back” edition, we will generally be publishing it on the first and third Tuesdays of every month. Also, expect the newsletter to be shorter each issue, to offer a quick read.

We welcome your news, and hope that you will send it to Felicia (ftcarri2@gmu.edu) or Anne (areyno12@gmu.edu) when you have some to share.

For now, though, we share the sentiment that Dean Ardis noted in a first-day-of-class post, “The sense of excitement about the new academic year is palpable! Welcome back to campus, Mason Nation!”
Research and Scholarly Works

About Us

The CHSS Research team is part of the Dean’s Office and charged with assisting faculty and staff in obtaining funding for their research and scholarship activities. Sometimes referred to as pre-pre-award, research development provides tools and resources to develop competitive applications that convey the importance and timeliness of the projects proposed. We are located in

The College of Humanities and Social Sciences
Horizon Hall, Room 6100
4400 University Drive, 3A3
Fairfax, VA 22030-4422

The CHSS Research team (see contacts in right sidebar) seeks to provide CHSS faculty and staff with the support they need to be successful in their research and scholarship endeavors.
Research Support Overview and Refresher

CHSS Research Resources-GRP

- CHSS Research Virtual Coffee
- Proposal Development Resources

Documents

- CHSS Research Event Recordings
  - March 3, Brooke Alana Gowi
- FRDA 2022 Info Session - May CH...
  - May 19, Brooke Alana Gowi
- Mason Institutional Information
  - December 7, 2020, Brooke Alana Gowi
- OSP Policy
  - September 29, 2020, Brooke Alana Gowi
- Proposal Library
  - September 24, Brooke Alana Gowi
Research Development Services
resdev.gmu.edu
Other Departments in Mason

Research Services – Michael Laskofski

• Office of Sponsored Programs (OSP)
  ✓ Contracts – Eileen Gallagher
  ✓ Research Administration – Amanda Fucci-Bartoszek (as of September 24)
  ✓ Proposal and Award Management – Maggie Ewell
  ✓ Financial Management and Compliance – Angie Railey

• Office of Research Integrity and Assurance – Rebecca Hartley
  ✓ Human Subjects in Research (IRB)
  ✓ Animal Care and Use Program
  ✓ Export Control and Secure Research
  ✓ Responsible Conduct of Research (RCR)
  ✓ Conflict of Interest
  ✓ Misconduct in Research and Scholarship

Office of Technology Transfer – Hina Mehta and David Grossman
Research Development encompasses a set of strategic, proactive, catalytic, and capacity-building activities designed to facilitate individual faculty members, teams of researchers, and central research administrations in attracting extramural research funding, creating relationships, and developing and implementing strategies that increase institutional competitiveness...

Research Development includes a broad spectrum of activities that vary by institution, including: funding opportunity identification and targeted dissemination; grant/contract proposal development; research team building; interaction with funding agencies and institutional research administration and leadership; interaction with institutional federal relations; and outreach activities and training.

-www.NORDP.org
Central Research Development Activities

Identification and Distribution of Funding Opportunities

Virginia Center for Innovative Technology (CIT) newsletter/listserv

National Institutes of Health (NIH) and National Science Foundation (NSF) Updates (daily and weekly)

Philanthropy News Digest

NORDP and other Research Administrator List-serves
Central Research Development Activities
Limited Submission Opportunities

Limited submission opportunities are those funding opportunities where the funder limits the number of application the institution can submit.

Identification through SPIN SMART Alerts and weekly database searches
  Evaluate opportunity to determine whether it is of broad interest or should be directed to specific departments

Bi-weekly posting of new opportunities and listserv distribution

Manage internal reviews and selection process (develop scoring sheet, recruit reviewers, provide recommendations to VPR) – coordinate with Office of Sponsored Programs (OSP)

See guidelines for limited submission opportunities (https://resdev.gmu.edu/limited-submission-process/)
Central Research Development Activities

Major Proposal Development (either large funding or complex teaming)

• Connect faculty in different academic units
• Creation of outlines with proposal sections overlaid with review criteria
• Assist with consultant and other outside partners
• Project and timeline management
• Team meetings
• Drafting supplemental documents
• Reviewing and editing drafts
• Coordinating as needed with Office of Sponsored Programs (OSP)
Central Research Development Activities

External Relationships

- Meet with/have conversations with potential partners, connectors and funders to understand opportunities then connect with faculty (Howard Hughes Medical Institute, CIT, etc.)

- Coordinate letters of support, MOUs, etc. when needed
Central Research Development Activities

Grant Writing Resources

Worked with The Conafay Group to present an NIH Grant Day; The Conafay Group continues to support biohealth faculty through a contract with IBI

Rolodex of Grant Writing Consultants

Graphic Design Support

RDS now has an advanced student graphic designer/science illustrator available to help faculty create strategic, eye-catching print and digital materials on a per project basis (fee for service; $13/hour). Learn more here: https://resdev.gmu.edu/graphic-design-support-request/
Finding Funding

Sponsored Programs Information Network (SPIN)
https://spin.infoedglobal.com/Home/SOLRSearch
- Over 40,000 opportunities from more than 10,000 global sponsors
- Powerful data mining
- Intuitive to use
- Multiple search modes
- Customizable filters
- Time-saving advanced features including SMART Alerts

Foundation Directory Online

*Foundation Directory Online* (FDO) objective is to deliver quality funding prospects. By combining exhaustive data with intuitive search functionality and informative data visualizations, FDO delivers the information you need to reach your fundraising goals quickly and efficiently.
Additional Resources

Early Career Proposal Development

Identification of funding opportunities for early career faculty

https://resdev.gmu.edu/funding-opportunities/funding-opportunities-for-new-and-early-career-faculty/

RESOURCE: New Faculty Guide to Competing for Research Funding

Contact Information

• Rebekah Hersch, Interim Associate Vice President, Research and Innovation (rhersch@gmu.edu)

Websites:

Research and Innovation Initiatives: https://rii.gmu.edu/
Research Development: https://resdev.gmu.edu
Office of Sponsored Programs: https://osp.gmu.edu/
Pre-Award Support: Grant Administration

Regis Saxton, Research Administration Manager
Maggie Ewell, Associate Director, Proposal and Award Management

October 22, 2021
OSP Roles & Process

• Pre-Award
  – Review Funding Opportunity Announcement and any other Sponsor guidelines and create checklist for PI
  – Review budget and budget justification
  – Review proposal for administrative compliance
  – Prepare proposal package
  – Obtain needed Authorized Organization Representative and higher-level approvals/signatures for submission
  – Submit proposal

• OSP review provides assurance:
  – Your proposal will not be administratively removed from consideration prior to panel review or disqualified administratively after a positive panel review
  – No delay in award set up if you are awarded
## Responsibility Matrix

<table>
<thead>
<tr>
<th>Task</th>
<th>PI</th>
<th>OSP</th>
<th>Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meet sponsor guidelines &amp; requirements</td>
<td>Primary</td>
<td>Verifies</td>
<td></td>
</tr>
<tr>
<td>Create a RAC budget &amp; justification</td>
<td>Primary</td>
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<td>X</td>
</tr>
<tr>
<td>Finalize technical proposal</td>
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<td></td>
</tr>
<tr>
<td>Complete application forms</td>
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<td>X</td>
<td>Primary</td>
</tr>
<tr>
<td>Establish a timeline to meet 4-day deadline</td>
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<td>X</td>
<td>X</td>
</tr>
<tr>
<td>COI completed for all named faculty</td>
<td>Primary</td>
<td>Verifies</td>
<td>X</td>
</tr>
<tr>
<td>Secure departmental agreements</td>
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<td>X</td>
<td>Verifies</td>
</tr>
<tr>
<td>Secure reps &amp; certs, DU or NDAs</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Complete current and pending</td>
<td></td>
<td>X</td>
<td>Primary</td>
</tr>
<tr>
<td>Submit final compliant proposal</td>
<td>Verifies</td>
<td></td>
<td>Primary</td>
</tr>
</tbody>
</table>
Mason 4-Day Deadline

• University Policy 4006.III.A2b: “...Proposals must be submitted to OSP four days prior to the sponsor deadline to ensure sufficient lead time for review, approval, and preparation of the proposal package.”

• Purpose of Policy
  – Ensure proper resource allocation
  – Fairness to colleagues
  – Account for system errors/delays

• Failure to meet the policy
  – Greatly diminishes the capacity of OSP to assist in preparation, review, & approval. OSP will not review the day of submission.
  – May result in either inability to submit or rejection by sponsor
  – Compliance issues during award set-up
Budget Development

https://osp.gmu.edu/budget-preparation/

- Budget Templates
  - Budget and budget justification
- Salary Cap information and Rates
- Cost accounting exemption request form
- Fringe benefit rates
- Tuition Rates
- Compensation/Hours for GRA's
F&A Costs

• Charged to awards at rates appropriate for the type of activity (e.g. research or instruction)
• Must be based on the location where more than 50% of the project effort is exerted by project personnel on the specific grant funded project (telework locations excluded)
• F&A rates negotiated with Office of Naval Research
  ▪ Mason policy is to fully recover F&A costs
• F&A waiver process
• FAQs
Best Practices

1. Submit a Request for Assistance >21 days in advance of the proposal deadline
2. Dialogue within CHSS and OSP about your project
3. Gain a basic, working knowledge of research administration
4. Understand thoroughly your roles and responsibilities
5. Manage your stakeholders well
Top 5 Items to Complete Early!

1. **Request for Proposal Assistance**
2. The Budget... and the Budget Narrative.
3. Notify OSP of your intention to subaward
4. Ancillary & compliance documents (e.g. biosketches, Current & Pending, human subjects forms, etc.)
5. Ask about the odd stuff
Pitfalls to Avoid

1. Providing the Sponsor with a budget without going through OSP or promising the Sponsor a certain budget amount, indirect rate, fringe rate, etc.
2. Thinking that you can use the off-campus indirect rate anytime you are working off campus.
3. Not requesting an indirect rate waiver if you are trying to use an indirect rate below the negotiated rate when there is no Sponsor limit.
4. Submitting Proposal documents after the 4-day deadline.
5. Submitting a proposal on your own!
Post-Award Support: Grant Administration

Regis Saxton, Research Administration Manager
Maggie Ewell, Associate Director, Proposal and Award Management

October 22, 2021
OSP Proposal and Awards Team Roles

• Post Award
  – Set up award & modifications
  – Request and process post award actions
  – Respond to questions or concerns during post
  – Review and approve journal vouchers and funding change forms
  – Set up pooled positions
Post award process

- Collaboration between OSP Proposal and Awards team, contracts team, College fiscal/Dean’s office, and PI
- Timeline for set up varies widely. Factors influencing new award set up:
  - Notice of Award terms and conditions
  - Discrepancies between Award and Proposal (budget, cost share, indirect rate, etc.)
  - Mason Administrative requirements (i.e. routing incomplete, COI disclosures not done, cost share approvals)
  - Inclusion of lab safety, animal or human subjects
  - Positive conflict of interest requiring COI committee review
  - Sponsor withholding terms
  - Difficulties with Sponsor grant award systems
- Goal: Once all issues are resolved, awards are set up and funds available within 5 business days of full execution.
Award Notification

1. Sponsor issues Notice of Award
2. OSP Contracts Reviews Terms and Negotiates with Sponsor
3. Assistant Vice President of Research Signs Award
4. Award Review/Set-up Process Begins
Where does Notice of Award come in to?

- OSP Authorized Representative via email
- OSP hard copy via mail
- PI email – please forward ASAP to OSP. COMMON CAUSE OF DELAY
  – awardgld@gmu.edu (cc your OSP team manager)
- Accounts Receivable – check arrives with no identifying information
  • COMMON CAUSE OF DELAY
The details...

- **Budget**
  - Does our budget match award?
  - Is award fully funded?

- **Withholding conditions**
  - Sponsor terms
  - Modification requirements

- **Special Review requirements**
  - Positive COI
  - Export Control
  - CUI
  - Lab Safety
  - IRB
  - IACUC

- **Internal Review Procedures**
  - Routing
  - Cost Share approvals
  - PHS CITI training
  - Backing into an Award
Sponsor Grant Management Systems

- eRA Commons
- Grant Solutions
- NOAA Grantsonline
- JusticeGrants
- NASA shared services
- Research.gov
- MyGrants
- EGMS
Post award process

1. Signed award assigned to Grant Administrator
2. Grant Administrator inputs information into OSP PATS award database to begin award set up
3. Award set up reviewed and uploaded to Banner (overnight)
4. New award notification sent to PI, CoPIs, and unit contact
5. Grant Specialist enters budget information into Banner
6. Award ready for spending!
7. PI notified if there is Lab Safety, IRB, IACUC, or COI approvals needed
8. If a PHS award, CITI ethics training required once every 3 years
9. Special Reviews (Lab Safety, IRB, IACUC, COI), completed
10. Award letter with attached award documents, budget, and signature card sent to PI and CoPIs, with CC’s to appropriate College reps.
Coordination with Unit Administrator

• Once you receive notification from OSP that your Award is officially set up, contact your Unit Administrator to:
  – Complete the Signature Card
  – Begin Charging Labor Effort and Other Spending

• Don’t forget to regularly reconcile your award effort and spending with your Unit Administrator!
  – Recommend no less than bi-monthly; monthly is a best practice!
Post Award Management

• Modifications
  – Reach out to OSP Research Administration Management to discuss needed modification
  – Award terms and conditions reviewed
    • Does Mason have Authority to make change?
    • Is Sponsor formal/written approval required?
  – Common modifications: period of performance, revised budget, key personnel changes, scope of work changes

• Prior approvals
  – Equipment, Travel

• PI and Co-PI Changes
  – Requires Sponsor notification and approval
  – Indirect distribution change
Post Award Management

• No Cost Extensions
  – Is Sponsor approval required?
  – How long?
  – Why?
  – Reports

• Carry Over
  – Allowed under Award Terms?
  – Prior approval?
  – Method

• Don’t forget inform your Unit/Dean’s Office and get necessary approvals prior to coming to OSP!
Questions?
CHSS Research Post Award

• Janice Cohen, Director, Finance & Research Operations, CHSS Research Post-Award
• Olga Shchepina, Associate Director, Post Award Services
• Mike Washburn, Grants Analyst, CHSS Post Award
Award Management

• PI: primary responsibility for accomplishing the technical/programmatic goals of the project while also complying with the financial and administrative policies and regulations associated with the award
  o Approval of expenditures
  o Monitor and oversee subrecipients
  o Review and approve reconciliations
  o Complete technical reports and other deliverables as required
  o Review and approve payroll certifications (federal awards)

• Department Admins:
  o Processing expenditures (labor and purchasing goods/services)
  o Reconcile sponsored awards and monitor allowability/allocability
  o Assist with forecasting project budgets, monitor project spending

• Dean’s Office (Finance)
  o Financial compliance oversight (liaison with OSP and departments)
  o Assist departments/PIs with project financial management
  o Review and approve externally sponsored expenditures
  o Provide guidance on research policies and procedures
What can be directly charged to an externally sponsored project?

1. **Allowable** – cost is allowable under the provisions of Uniform Guidance, the terms and conditions of the specific award/sponsor, and Mason

2. **Allocable** – the cost can be associated to the project with a high degree of accuracy

3. **Reasonable** – the cost reflects what a “prudent person” would pay in similar circumstances

4. **Consistent** – the cost is treated the same across the University or other similar circumstances
Award Management – Best Practices

• Expenditures are charged to the appropriate project initially

• PI and Department Admins review and monitor the project on a regular basis
  o Expenditures charged are appropriate
  o Errors are identified in a timely manner
  o Appropriate corrective actions are taken in a timely manner
    - For federal awards, errors must be corrected within 119 days of original transaction
Award Management - Labor

- Faculty effort is processed through funding change forms (FCFs) and temporary positions (GRAs, wages, summer research) are processed through Electronic Personnel Action Forms (EPAFs)
- PI communication with department administrator is key
- Provide sufficient notice to ensure all hiring actions can be completed before employee work actually begins
- Payroll schedules and deadlines are important
- Payroll Certification
  - Certification of labor charges (and cost sharing) that is required on all federal awards (annual and at closeout)
  - Charges are reasonable in relation to the work performed
  - Reports must be reviewed and approved by PI
  - Reports not certified within 60 days will result in salary charges moved to a non-sponsored funding source

Guidelines for Charging Faculty Salary to Sponsored Projects
CHSS Academic Year and Summer Effort on Grants
Award Management – Goods and Services

• Sponsored projects often have budget restrictions
  o Review awarded budget and award terms and conditions for specific details
• All expenditures must have PI approval and must comply with institutional procurement policies and procedures
• PI communication with department admin on project needs is key
• Typical unallowable expenses:
  Telephones
  Postage
  Food & Beverage
  Parking
  Professional Membership Dues
  Printing/Copying
  General office supplies
  Books
  Facilities
Award Management – Monthly Financial Report, PI Reports

- Summarized financial snapshot of award
- PIs will have MicroStrategy access and can run reports at any time
- System automatically generates monthly summary report sent via email to PI

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<th>Expenses To Date</th>
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Reconciliation – a systematic review of Banner financial activity to verify that all charges and credits are accurate and appropriate, to include identifying expected transactions that have not yet occurred.

Why do we reconcile:
- Confirm expenditures do not exceed available award budget, are within the period of performance and ensure expenditures are appropriate according to the approved budget and are intended for the purpose of the project
- Confirm no missing expenditures/credits
- Identify and correct errors in a timely manner

PI responsibility for reconciling:
- Ensure admin submits monthly *(encouraged)* or bi-monthly *(required)* reconciliation report for PI review
- Review and approve reconciliation within 60 day deadline
- Ensure corrections are completed within 90 days of expense posting

**CHSS Reconciliation Guide for PIs**
**University Policy 2114: Reconciling Department and Sponsored Fund Accounting Records**
Award Management – Post Award Modifications

Circumstances may arise that warrant the need for post award modifications that require sponsor approval. Examples: no-cost extensions, PI changes and transfers, budget revisions, and changes in scope of work.

- PI:
  - Recognize the need for a post award modification
  - Inform Department Admin and/or Dean’s Office (Finance)
  - Email OSP Green Team Manager when post award modification need is identified

- OSP:
  - Works with PI, administrators and Dean’s Office to coordinate post award modifications
  - Will inform PI/department if a formal Request for Assignment is necessary
  - Submits official request for all post award modifications to sponsor

- Dean’s Office
  - Assists PI/department with questions regarding post award modification needs
  - Works with OSP and department on submitting and preparing requests to OSP
Billing/Reporting and Closeout

• **OSP:**
  - Primary responsibility for billing, financial reporting and closeout documentation
  - Closeout notices are emailed and indicate final reporting deadlines

• **PI:**
  - Responsibility for submitting technical/progress reports (final copies should also be sent to OSP)
  - Work with department admin to verify all expenses have posted, project is not overspent
  - Receives 30-60-90 day closeout report via email automatically from PI Reports
  - All open commitments must be closed and subcontract closeout completed

• **Dean’s Office**
  - Department admins receive monthly emails identifying projects within 30-60-90 days of closeout
  - Works with OSP and department on any billing issues/clearing overspent