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# **Office of Sponsored Programs and Foundation Relations**

# **GRANT PROGRESS CHECKLIST**

# *Created August 2021*

*Next review: Fall 2023*

***This form is to be used by the Office of Sponsored Programs*** ***and Foundation Relations to document Grant Progress.***

**Meeting date:**

**Type of meeting:** [ ]  monthly [ ]  quarterly with Business Office [ ]  annual/grant anniversary

**Name of PI/PD:**

**Funder:**

**Grant Program:**

**Award Number:**

[ ]  **Status of completing CITI Effort Reporting training**: Did the PI/PD complete the training before spending down any grant funds?

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| OSPFR Comments: |

[ ]  **Status of grant project**: Are you meeting the milestones of the grant project? Have you been able to complete objectives?

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| OSPFR Comments: |

[ ] **Challenges**: Have you encountered any problems/challenges? What are the possible solutions to solve those challenges?

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| OSPFR Comments: |

[ ]  **Personnel**: Have there been any changes to personnel implementing the grant project?

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| OSPFR Comments: |

[ ]  **Budget/Spending**: How is the spending going? Are there remaining funds in any budget lines that need to be spent or carried over into the next grant year? If your grant includes student stipends or scholarships, have you reconciled your numbers with Student Financial Services?

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| OSPFR Comments: |

[ ]  **Upcoming deadlines**: Grant Coordinator reviews upcoming reporting deadlines/instructions for submission with PI/PD. Grant Coordinator will provide feedback on grant report before submission to funder.

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| OSPFR Comments: |

[ ]  **Subrecipient monitoring (if applicable)**: Is the subrecipient completing deliverables (e.g., achieved project milestones, submitted progress reports)? Has the subrecipient submitted invoices?

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| OSPFR Comments: |

**Quarterly check-in meetings**

[ ] **Personnel Activity Reports**: Topic covered by the Senior Staff Accountant.

[ ] **IRB or IACUC approvals (if applicable)**: Does the PI/PD need to renew its IRB or IACUC approval? Has the research protocol changed and require new approvals?

**Grant anniversary meeting**

[ ] **Financial conflict of interest requirements**: Did the PI/PD and other key personnel complete an annual FCOI form? Is their CITI FCOI training up-to-date?

[ ] **Responsible Conduct of Research requirements**: If students are engaged in federally funded research, did they complete CITI RCR training? Did they complete the RCR training documentation form?

[ ] **Identification of foreign influences**: Does the PI/PD or other key personnel have any foreign affiliations that they need to declare?

[ ] **Equipment inventory**: Did the PI/PD label all federally funded equipment with the name of the funder, award number, and date? Did the PI/PD complete an equipment inventory form?

**Other OSPFR comments:**

Form completed by:

Date: