I Need a Do Over!

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Proposal Deadlines

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- Roles & Responsibilities
- Know the end
- Have a plan
- Get folks on board
- Know alternatives for submission
  - Don’t always trust electronic systems

Cost Sharing

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- How much is too much?
- Identifying Sources vs. Actual Spending
- What qualifies as cost sharing?
  - Defining the project scope
  - Amounts too small to matter?

Cost Sharing – Part 2

Your PI Said What?

- Read the resources, budget justification and, if possible, scan the text of the proposals
- Legal implications
- Financial implications
- What do you do now?

Establishing Effort Plans

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- No reason not to, every reason to!
- Create a safe space
- Know the requirements that are non-negotiable
- Choose how to communicate

Encumbrances

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- Who’s minding the store?
- Subawards
- Intended purchases

Invoice Submitted Too Late for Payment

Invoicing Submitted Too Late for Payment

- Negotiate invoice schedules
- Initiate Close-out Activity Prior to End Date
- Notify Sponsor if Running Late
- Risk Assessment
  - Outstanding Vendor Payments vs. Posted Charges

Relinquishing Statements

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- Checklist for Departing PI
- Estimate of Final Expenditures
  - Don’t forget a “reserve” for late or unanticipated expenses.
- Don’t assume that the Sponsor will accept revisions.

Uninvited Company

When a Stranger Comes to Call

- Who should you talk to and who shouldn't you?
  - Who can authorize visits?
- Importance of monitoring visitors
  - Safety precautions
  - Data management
- Is there anyone you should call?

Don’t send that email!

Don’t Hit Send

- Read, re-read, re-check…. Delete
- Sensitive Subjects? Don’t use!
- Not as sensitive, ask someone to read
- Never send anything you wouldn’t say

Your Favorite?