

Grant Close-Out: Principal Investigator/Project Director Responsibilities

The office of Sponsored Projects (OSP) will need the tasks completed before the final date of the grant period. As always, any correspondence with your program officer will need to include the Sponsored Projects Manager and the AVPAA.

Regarding supplies, equipment, furniture: Please do **not** promise or give any grant supplies, equipment, furniture, or space to anyone. These items and location(s) are property of the grant or the University in some cases.

Regarding leave/vacation: Six (6) months before the end of the grant period, an assessment of any accrued leave time needs to be completed, and the accrued time is taken before the end of the grant.

Any time not taken before the end of the grant period will not be available as a payout at the end of your employment. Additionally, grant employees are funded through external sources; therefore, funding for payout after the closeout is not available. If you have questions, do not hesitate to contact OSP.

Tasks or Items: (timeline is optional unless noted)

1. List of equipment that the grant has purchased
 - a. Provide the list to the OSP Manager no later than two (2) weeks before the staff's last day on campus
 - b. Provide the following information for each item:
 - i. ENMU Asset Tag
 - ii. Description
 - iii. Serial Number
 - iv. Grant Code (Index)
 - v. Current Location
 1. If necessary, what department, other than your, is utilizing the equipment
2. List of supplies that are at hand
 - a. Provide the list to the OSP Manager
 - b. Items must be boxed and delivered to OSP by the last day of the grant or staff's last day on campus
3. Ensure all long-term leases, agreements, or purchases have been terminated
4. Organize, label, and box all grant documents
 - a. Arrange for delivery of the boxes to OSP during the last week of the grant
 - b. Ensure the following are included and labeled appropriately
 - i. Grant Adjustment Notices (GANs), fiscal agreements
 - ii. Reports and documents:
 1. annual progress reports, research results, published reports/documents, etc.
 - iii. Fiscal reports
5. Provide access to the grant' Shared Drive
 - a. Compile all electronic documentation that is not in the Shared Drive and add it to the drive
6. Provide documentation from the program officer releasing all supplies and equipment to ENMU or instructions for returning to the awarding agency.

Two (2) weeks before the end of the grant:

Create Termination SPANs for all externally funded employees. Process the SPANs through the proper channels and for approvals.

Last week of the grant:

Boxes that are organized and completed should be transported to OSP.

Last day of the grant:

Complete the following and provide the documentation to the OSP Manager

1. Return your keys for any offices and buildings to the Physical Plant, and send the signed-off sheet to the OSP Manager for the files
2. All remaining boxes should be sealed and stacked neatly in your area
3. Enter your final time and submit for approval
4. All electronic equipment should be disconnected and left neatly in your area unless previously approved