

Principal Investigator Termination Checklist

If you are the PI on any current or ongoing awards and you are leaving employment at Montana State University you will need to take steps to address several issues.

Grant Closeout:

If the grant is to remain at Montana State University a new PI must be identified and the sponsoring agency must approve this person. Typically this is accomplished with a letter requesting the change and a copy of the new PI's vitae. A signature from the authorized representative for MSU may be required as well depending on the sponsoring agency requirements.

If you are transferring to another institution and desiring to move grant(s) to the new institution you will need to contact your department head for approval first and then the Grants & Contracts Office to identify the specific transfer requirements for your project's sponsor. Most frequently on federal awards a final financial report will need to be submitted that reflects the unexpended balance that could be moved to your new institution.

Equipment:

If you are transferring to a new institution and you wish to take any equipment purchased with grant funding during your employment at MSU you must prepare a listing to be presented to your department head and the Grants and Contracts Office for approval. Any release of equipment will be at the discretion of the department head and also in accordance with the sponsoring agencies policies on transfer of equipment. A copy of the approved list will need to be supplied to the Property Management Office so that accurate inventory records can be maintained and the MSU property control tags get removed. For government owned equipment, the underlying grant/contract document will provide the disposition instructions to follow.

Final Reports and Deliverables:

As the PI on a grant/contract it is your responsibility to ensure that the final technical report and any other deliverables as required under the contract documents are delivered to the sponsor within the allowable time frame and prior to your departure from MSU.

Facilities and Administrative (F & A) PI Fund Balances:

Once PI terminates from their position at the university any unexpended funds in the PI F & A return fund will revert back to the department IF there are ongoing obligations, otherwise the monies will be returned to the Vice President for Research. It will be the responsibility of the department to request retention of these funds by supplying an outline of how the funds are to be utilized. The decision to release these funds to the department will be made at the Vice President for Research level.