We had a good meeting this morning with DeAnna Bilsland to review how the grants management database is progressing. DeAnna showed us the database that now has four tabs. The first tab contains the overview information about the specific project; the second tab relates to the IRB process; the third tab where Budget information will be housed (this looks great and we appreciate the multiple lines available for multi-year awards); and, the fourth tab is a “correspondence” tab that will allow us to specify contacts with the federal agency and keep the records current.

The information is being keyed off the G/L number; however, we explained to DeAnna that we also need a link to the preliminary internal proposal number that Kirkwood will assign when the grant proposal is submitted. DeAnna explained she will add this information to the database. This should ensure we are tracking all grant information in an efficient manner.

Other Items Discussed

1. DeAnna will begin working on the grants management tab as her schedule allows. We again reviewed the internal process of what happens to ensure we think of other areas where information will need to be added.
2. We discussed in detail the Colleague fields and their importance of feeding into the database correctly. We specifically spoke of the need for accurate financial data on our grant projects, and that we do not know how many fields from which Colleague pulls data on a specific object code in the system.
3. DeAnna will talk with Nancy McCoy regarding the Colleague reports that are generated for Business Services on a monthly and/or quarterly basis to determine if that information is coming from the “warehouse” or from somewhere else. DeAnna will report back to the team on her findings.
4. Debbie will talk with Kara regarding a specific report prepared on 3/17/08 by Kara, and the differences between that report and Nancy McCoy’s reports. Debbie will report back to the team on her findings.

Pertaining to General Ledgers and Budgets

DeAnna, we want to ensure we understand how the data will be sorted in this area. It will be on all active grants, and will they sorted in order of General Ledger number? We’re trying to envision how the screens may appear to look when they are operational.

Next Moves

We will await an update meeting in the next four to six weeks (May 8 through May 22, 2008) to review the progress made on this database, and to address any additional items that have been determined as a helpful addition to the database.

DeAnna, thank you for your efforts and your time this morning to review where we’re at in this process. We appreciate the “branded” look you’re giving to the database, and are excited by the possibilities this system will allow.

Debbie Mrkvicka