

**Management of Externally Funded Grants
Roles and Responsibilities**

	Foundation and Corporate Relations (FCR)	Principal Investigator/Project Director (PI/PD)	PI/PD and Support Staff Shared Responsibilities	Support Staff	Grants Accounting
Pre-award	Identify potential funding sources and coordinate their solicitation. Work with faculty to edit grant proposals, gather supporting materials, obtain University approvals and track submission deadlines for proposals, Responsible for proposal submission	Prepare grant proposals and budgets in accordance with grant and University guidelines ensuring all deadlines are met	Complete WFS grant checklist and grant budget pages in WFS Production Database		Facilitate grant applications, review proposal budgets to ensure correct salary, benefits and indirect cost calculations
At the time of the award	Make note of all reporting deadlines for Foundation and Corporate awards Send all award letters and checks to grants accounting if received directly by FCR		Review the award letter, review the budget, make note of start and end dates, make note of special terms and conditions and report due dates. Create file		Update WFS proposal status. Notify PI/PD and support staff of awards, create accounts and set up budgets, ensure reporting deadlines are explicit at the time the award letter is received by the PI/PD and support staff
Post award	Work with PI/PD to submit annual and final narrative and financial reports on private grants	<p>Manage the research or program according to the scope of work, work plan, methodology, aims and goals presented into the proposal application</p> <p>File required reports on a timely basis</p> <p>Direct support staff as to personnel working on the grant</p> <p>Monitor expenses against sub award budgets</p> <p>Direct support staff to rebudget and reallocate funds as needed within grant guidelines</p>	Manage funds according to rules and regulations of the sponsor and University	<p>Process expenses, charges against the grant and monitor balances to include:</p> <p>Keep PI/PD informed of balances at least monthly</p> <p>Apply proper account codes, make timely corrections</p> <p>Monitor charges for allowable costs; ensure common unallowable costs are not processed</p> <p>Remind the PI/PD of reporting deadlines and end dates</p> <p>Adhere to fiscal year end deadlines</p> <p>Monitor encumbrances from unused or open purchase orders</p> <p>Process commitment accounting changes and salary/wage transfers</p> <p>Ensure proper backup for all transactions</p> <p>Perform the administrative tasks needed to close out an award</p>	<p>Manage and oversee post-award sponsored grant programs and coordination of audits</p> <p>Review all grant expenditures to ensure that federal and state grant regulations are met</p> <p>Prepare reimbursement invoices and required financial reports and filings ensuring compliance with all accounting and reporting requirements</p>