Management of Externally Funded Grants
Roles and Responsiblities

	Corporate, Foundation and Government Grants	Principal Investigator/Project Director (PI/PD)	PI/PD and Support Staff Shared Responsibilities	Department Support Staff	Grants Accounting
Pre-award	Identify potential funding sources and coordinate their solicitation. Work with faculty to edit grant proposals, develop budgets, gather supporting materials, obtain University approvals and track submission deadlines for proposals. Responsible for funder compliance & 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 office. Facilitate grant agreement reviews and signatures. Assist Grants Accounting with records updates, as needed.		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 smartkeys, set up milestone email alerts, set up budgets, and set up security access.
Post award	Work with PI/PD to submit annual and final narrative and financial reports on private grants. Monitor spending rates on grants with Grants Accounting and Academic Affairs.	Manage the research or program according to the scope of work, work plan, methodology, aims and goals presented into the proposal application. File required reports on a timely basis. Direct support staff assigned to work on the grant. Monitor expenses against sub award budgets. Direct support staff to rebudget and reallocate funds as needed within grant guidelines.	Manage funds according to rules and regulations of the sponsor and University.	Process expenses, charges against the grant and monitor balances to include: Keep PI/PD informed of balances at least monthly. Apply proper account codes, make timely corrections. Monitor charges for allowable costs; ensure common unallowable costs are not processed. Remind the PI/PD of reporting deadlines and end dates. Adhere to fiscal year end deadlines. Monitor encumbrances from unused or open purchase orders. Process commitment accounting changes and salary/wage transfers. Ensure proper backup for all transactions. Perform the administrative tasks needed to close out an award.	Review all grant expenditures to ensure that federal and state grant regulations are met for purposes of allowability. Run monthly reports to check for grants in deficit. Work with department to correct. Initiate draw downs or process monthly invoices. Process payments when they are received. Follow up on outstanding receivables. Approve salary redistributions or commitment accounting changes and new positions in Careers. Complete all financial reports required. Process no-cost extension requests. Draft all sub-contracts and enter required information into FFATA. Coordinate all federal and state audits as well as the annual NSF survey. Negotiate a new IDC rate every 4 years. Perform the physical inventory for all federal equipment. Run the vendor report to search for suspended and debarred vendors.