

## Responsibilities

### *Pre-Submission*

D = Grant Director

W = Grant Writer

PI = Principal Investigator

F = Financial Department

CD/CC = College Dean/College Chair

DA = Dean of Academic Operations

\*\*If the grant is for WU's nonprofit, substitute CD/CC for board member

Steps	Who	What?	Support Information
1	PI	Generate idea, submit grant proposal clearance form	Grant Proposal Clearance Form: WU/WU Endeavors
2	D	Review grant proposal clearance form: (1) Return to PI for changes; (2) Pass on VP signature	
3	W/PI	Find Funding	How to Find Funding
4	D/W	Affirm eligibility for funding	What to Look For
5	PI/W	Call Program Officer prior to proposal creation	What to Ask a Program Officer
6	PI/W/D	Submit LOI (if needed)	What is an LOI
7	PI/W/D	Meet to Discuss Project/Program Plan	Project/Program Design
8	W	Write the Grant Proposal	
9	W/PI	Meet to Confirm Grant Proposal	
10	CD/CC	Review Grant Proposal	Final Approval: Grant Proposal
11	D	Final Review of Grant Proposal: (1) Request Adjustments from PI; (2) Route for final signature of VP	
12	DA	Verify Compliance Against University Policies	
13	D	Submit Proposal	

14		Email Confirmation to PI	
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***Award Implementation and Management***

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Steps	Who	What?	Support Information
1	D	Receive Award Notice	
2	D/PI	Meet to discuss any necessary negotiations about the award	
3	D/DA/ VP	Sign Initial Paperwork	For local and corporate grants, the D will add letter of appreciation, acknowledgment of reporting requirements, and invitation for visit to signed letter of acceptance
4	D	Email initial paperwork to the sponsor	
5	D	Create Monday.com tab based on grant award reporting regulations, milestones, and expenditure tracking needs	
6	D/F	Set up independent cost center for the grant	Set process in place for using funds - signatures required from the F and D for all fund uses
7	D/PI/F/ CD/CC	Review grant details and responsibilities - agree to responsibility throughout grant life	
8	D/F	Create contract should subawards be included	
9	PI/F/D	Keep files up to date to ensure reporting deadlines are met	

10	D/W	Compile information and send reports to sponsor when indicated	
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***Closing the Grant***

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Steps	Who	What?	Support Information
1	D	Review grant account and prepare for final report submission	
2	D	Email department/organization to verify project/program is complete and all information has been added to the Monday.com folder	
3	PI/F/D	Compile all necessary forms for final closeout	Checklist for closeout
4	D	Submit final report to sponsor	
5	D	Set retention period based on funder requirements	Notify affected parties
6	D	Maintain basic information related to the grant obtained, for what, the amount, and how long it lasted	