How to Administer Your Grant

You've received funding for a grant – congratulations? But now what?

The Office of Research Enterprise provides all the information you need to know in order to accept and manage your funding. This document is a summary of that.

Submit Documents to the Research Grants and Contracts Office (RGCO)
Once you receive notification that you have been awarded a grant, you need to complete the acceptance of offer form (pages 3-5) of the application cover sheet and sponsored research deed polls. Every UWA researcher on your grant, including adjunct and clinical staff, must complete a deed poll.

If you have not yet completed the application cover sheet, please do so when you complete the acceptance of offer and SRDP. If you have questions about this form, please see our tips for completing the application cover sheet.

In addition, you will need to submit:

- A copy of the grant application
- Notification of award (i.e. the letter from the funding agency stating that you have been successful)
- Ethics approvals where necessary– these may take some time to receive; please submit all the other documents as you receive them as funding will not be made available without appropriate approvals.

Documents should be submitted electronically to researchgrants-ore@uwa.edu.au.

What if the funding is split between multiple Institutions/Agencies?
If there are numerous collaborators and/or Institutions involved in your project, you may have received a memorandum of understanding (MOU) or multi-institutional agreement (MIA) to sign or even a large contract from the funding organisation. If you have received any of these documents or believe the new project requires any of these documents, please contact the Research Grants and Contracts Office (researchgrants-ore@uwa.edu.au) to discuss your needs to make informed decisions about your research.

If you are commencing a clinical trial, RGCO can also advise you on aspects of Agreements (Funding; MIA; IP; Insurance and Privacy).

When can I start spending the money?
Once RGCO has received all necessary documentation and the agreement/contract is signed, the grant is forwarded on to a research finance team member according to your Faculty and the funding scheme. If all documentation is in place, establishing a PG usually takes five working days.

Once you receive your PG number, the relevant research finance team member will also send you a Finance Schedule that details the timelines for invoicing your funders with detailed amounts, as well as any milestones to be met. As soon as you have a PG, you can start to spend the funds.

How do I spend the money?
That depends on what the money is to be spent on (what you listed in your budget) and any special conditions in the agreement.
Service Delivery Centre personnel can help you get your project started:

- Hiring and paying staff – contact the HR team (hr-hms-hr@uwa.edu.au)
- Travel – you can arrange your own travel using Concur; YOU CANNOT BOOK YOUR OWN TRAVEL AND BE REIMBURSED LATER!
- Equipment/consumables – generally paid by purchase order, arranged by the Finance team (finance-hms@uwa.edu.au)

How do I keep track of the funds in my PG?
The University uses PeopleSoft financial reporting software, and the finance team in your Service Delivery Centre can send you reports as needed. You can also ask to have these set up on a monthly basis. It is a good idea to check your PG regularly to ensure that no transactions were incorrectly coded and you were erroneously charged for something that you did not purchase.

If you need assistance understanding the PG Reports and how to organise receiving regular PG reports for your funding, please contact the HMS Finance team hr-hms-hr@uwa.edu.au.

What about reporting to the funding agency?
Frequency and content of reporting required will vary by agency, and in addition to being given in the funding application, the details may also be provided to you when you receive notification of your grant success. In some instances (such as ARC and NHMRC funded projects, and internal schemes), the RGCO also keeps track of reporting timelines and will let you know what is required. Financial reporting requirements will be actioned by the relevant research finance officer and submitted to the funding agency.

Closing your Project
It is important to note that the end date set on your PG is 3 months after the agreement/contract end date. This allows final expenditure from the last month of the project term to be processed (i.e. travel, credit card reconciliations) and for the CI to review all expenditure is correct. No new expenditure should be occurring after the granting period end date.

What if I have surplus funds I wish to carry forward when the project is due to close?
Generally most funding agencies require approval to carry forward unexpended funds beyond the agreement/contract completion date. By reviewing your PS reports regularly you will be aware of your current balance and can request an extension prior to the completion date.

The process to request carry forwards will vary depending on the funding agency, so check the guidelines and/or your agreement/contract at commencement so you are familiar with what their process is. If it isn't clear please contact the Research Grants and Contracts Office for clarification.

What if I need to extend the time of my project?
If you believe that you will not be able to complete your project according to the requirements of your funding agency, you need to notify Rob Roche or Christine Casey in the Research Grants and Contracts Office immediately to request a contract variation on your behalf.

Authors: HMS Research Development Team