Dr. X Has Received a Grant: What are the Next Steps?  

Grant Administration Tips

The desired outcome of the grant administration process at a recipient institution is to document performance, collect payment, and close the award. The following general tips are to help guide grant administrators in managing awards.

1. **Schedule a pre-performance planning team meeting between pre- and post-award administrators and Dr. X.**
   
   Also include: department manager, administrative assistant, purchasing specialist, account manager, fiscal manager, cook, janitor. [In other words, be sure to include all the people who will help manage the grant early on in the process; titles are irrelevant.]

   Provide copies of the award letter and grant agreement to all parties.

2. **Become familiar with the terms and conditions of the grant.**
   - Start and end date [to avoid disallowed costs].
   - Reporting – what and when and who.
   - Records that must be kept [cost share/matching].
   - Payment method.
   - Limitations on budget/project changes.
   - Know the sponsor’s grant administration and program contacts.

3. **Develop a schedule to meet performance deadlines.**

4. **Monitor the budget/change requests.**
   - Request modifications before making changes.
   - Communicate significant project delays as early as possible.
   - Fully justify change requests [unspent funds at the end of the grant is not sufficient justification].

5. **Use proper invoicing procedures.**
   - Use the sponsor’s award identification number.
   - Identify equipment purchases.
   - Explain any charges not in the approved budget.

6. **Monitor closeout actions.**
   - Provide final reports.
   - Collect final disbursement of funds.

For more information on Center grants, see [www.ncbiotech.org/funding/awardee-resources](http://www.ncbiotech.org/funding/awardee-resources). For questions concerning grant administration, contact:

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