

Life Cycle of a Grant at UMass Boston

PRE-AWARD Process

FINDING FUNDING

Pre-Award Team assists faculty with searching the Community of Science database for public/private funding opportunities, based on Principle Investigator's (PI's) area of interest

PROPOSAL DEVELOPMENT

PI provides ORSP with Request for Proposal (RFP) and proposal

ORSP reviews RFP requirements and ensures the PI's proposal meets requirements

ORSP reviews PI's proposed budget and, if required, assists in developing the budget

ORSP gathers signed internal documents and Cost share form (if required) and subrecipient form (if required)

ORSP submits proposal either electronically or prepares transmittal letter and mails proposal to funding agency

ORSP enters proposal information into its database

AWARD Process

PROJECT START-UP

ORSP receives award

Reviews terms and conditions

Negotiates contract (if required)

Updates database by turning proposal into an award

Prepares award note for file (background for billing requirements, reporting requirements, deliverables, etc.)

Award package forwarded to ORSP administrative assistant

Administrative assistant prepares the award folder

Administrative assistant prepares check off sheet for folder

Administrative assistant enters reporting due dates on the Microsoft Outlook calendar shared by ORSP staff (reports can be technical, financial, progress, etc.)

Administrative assistant passes the award folder to the Post-Award Team to input on PeopleSoft

PRE/POST- AWARD Management Services

Pre-Award Team prepares subcontracts (if required)

Pre-Award prepares amendments (no cost time extension, supplemental funding, budget revisions)

Pre-Award communicates with sponsor on issues related to the grant

ORSP administrative assistant sends a reminder letter to PI that a report is due

POST- AWARD Services

Post-Award Team creates an account by inputting the award into the university's financial system (PI uses the account number to identify source of expenditures)

Prepares project budget for input into financial system, which generates monthly reports

Once a PI purchases an item or service, Post-Award determines if the purchase was appropriate (or not) and then approves payment (or not)

Post-purchase auditing of project expenses charged to a pro card

Deposits checks made in payment for sponsored projects (receivables)

Inputs amendments and no cost time extensions into financial system

Generates interim and final project expense reports for sponsor

Closeout a project by generating a final report to sponsor (the report may be financial, narrative, include deliverables, patents, etc.); includes eliminating financial access to the project

The University has yearly financial audits and A-133 Audits on federal programs. Audits vary in level of detail requested. All requests for audits must be cleared through University Controller Leanne Marden

Office of Research and Sponsored Programs