

Externally-funded Grants and Contracts

Step-by-Step Procedures

1. Upon receiving notification of a new grant or contract from an external source (non-PLU):
 - Send email notification naming the grant as soon as possible to grants-group@plu.edu. This alerts key personnel in the **Business Office (BUSO), Finance and Administration, and Advancement** of its existence.
 - Attach a copy of the grant **award letter or contract** if one is available, and/or
 - Forward whatever notification you received from the funding source, including the **approved budget**.

2. If the grant contains a contract or agreement, which requires an authorized PLU signature, please forward the **original** to the Office of the Vice-President of Finance and Administration. (Keep a copy for your records.)

3. If the grant requires matching funds from PLU, provide an explanation stating where the matching funds will come from, along with the contract or agreement that is being forwarded for an authorized PLU signature.

4. As applicable, once the contract or agreement has been signed by an authorized PLU signatory, a copy of it must be forwarded to BUSO by the office in which the signer resides.

5. BUSO will establish a Banner FOAP for the grant and assign Banner Web access to the financial manager. BUSO will email this information to the financial manager, along with instructions for the **Signature/Banner Web Query Access Authorization Form**.

6. In authorizing expenditures to be charged to the grant or contract, the financial manager and all designated department personnel should follow carefully all provisions of the agreement, especially as they relate to allowable costs. In addition, the person or persons administering the grant must be aware of all reporting requirements, including grant narratives, which may be required of the PI (Principal Investigator)/financial manager.

7. Only BUSO accounting personnel may invoice or otherwise request financial reimbursement from the funding source.

8. Forward to grants-group@plu.edu any pertinent information regarding the grant that you may receive **in the future**, such as an extension or termination notification.