ARD Foundation Funded Projects

Project & Financial Management Guidelines

November 2019

Roles and Responsibilities by Functional Area

ARD

Project Administration and Set-up
- RFA distribution, applications review and awarding projects via NUgrant for faculty funded projects[1].
- Submitting a proforma Foundation Transfer form with authorized signature(s) to request new departmental WBS account(s), establish SAP Project Period and load Year 1 budget only.
- Communicating the account set-up information to the applicable business center personnel.
- Project based and on-going funding arrangements will be set up with a departmental 26-62## WBS
- Equipment purchases/one time funds will be set up on or use existing departmental 27-62## WBS

IANR Business Centers

Project Management
- Provide project progress and/or financial reports upon request or if applicable to RFA contingency funding requirements. See ARD Internal Funding RFAs archive for reference. (https://ard.unl.edu/internal-funding)
- Conduct account reviews and request transfers for expenditures over $5,000. The table below lays out recommended transfer frequencies based on planned annual expenditures.
    - For multi-year projects with budgeted allocations, work directly with the OSP Project Coordinator (cc: Jared & Jen) to load subsequent year budgets and extend SAP end dates as needed.

OSP Transfer Frequency Guidelines

Annual Expenditures	Process Transfer Form At Least
Exceed $200,000	Monthly
$50,000-$199,999	Quarterly
$30,000-$49,999	Semi-Annually
$0-$29,999	Annually

- For project based funding, Year 1 budget will almost always be loaded upfront in SAP. When requesting actual fund transfers, it is extremely important to indicate on the Foundation Transfer forms that budget has already been loaded. The top of the request form should note: **DO NOT ENTER BUDGET IN SAP – ALREADY ENTERED**. This way OSP will not load budget twice for the same project period. If you have questions, please ask.

Project Close-out (Final Year of Project)
- Provide project final and/or financial reports upon request or if applicable to RFA contingency funding requirements. See ARD Internal Funding RFAs archive for reference. (https://ard.unl.edu/internal-funding)
- No Cost Extensions should be submitted 30 days prior to project end date and follow the guidelines available on the ARD Internal Funding website.
- Follow standard project close-out procedures. **Please note**: ARD requires all final expenditures, account cleanup and revenue draws to be completed within 60 days of the project end date.

Finance & Personnel

The F&P Office will operate in a advisory role to ARD and will work with Office of Sponsored Programs to make WBS adjustments and/or corrections when necessary.

ARD contacts: Jared Evert (jevert2@unl.edu) or Jen McMahon (jmcmahon10@unl.edu)
Documentation available on the ARD internal funding site: https://ard.unl.edu/internal-funding

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[1] Faculty awards, student travel and student research projects administered thru a nomination process are currently not run via NUgrant but an award letter is still generated.