

GRANT SPENDING GUIDELINES

First, congratulations on your award! Before you begin spending funds, please be sure to read through and be aware of all guidelines to avoid any delays or inability to fund requests. Faculty members will be solely responsible to make sure they do not go over budget.

Requesting budget items:

1. Be sure to check your approved budget in your award documents. Only the budget approved by the funding agency will be considered. If any budget modifications are required, please inform ORI so that we can request prior approval from the agency.
2. When possible, please pay by invoice/ check requisitions. All reimbursement requests must be received by AP within 90 days of purchase or by the end of the grant deadline (whichever is sooner).
3. You will need to provide your secretaries/ admins with the following in your requests:
 - a. Grant proposal
 - b. Description of expenses being requested
 - c. Copy of the award letter & any additional back-up

Budget Tracking:

- You are encouraged to maintain a personal spreadsheet of grant expenditures. Official records will also be maintained by the ORI. At any time, faculty are welcome to request updated reports of their spending/ remaining funds.

Research Assistants/ Student Workers:

1. Once again, you must have research assistant/ student worker wages included in your original budget proposal or else this cannot be funded.
2. All research assistants must be current CBU students.
3. Once selected, send your student worker request to your secretary and admin.
4. Your secretary/ admin will process through student worker paperwork according to the grant instructions and FOAP, CC Director of Academic Operations (DAO) for Academic Affairs on all requests.
5. DAO will record expenses sent by payroll each pay period in your budget spreadsheet. This may be requested for updates on funds spent.

Gift Cards (work with your secretary/admin to process):

1. Submit Laserfiche Form for Cash Advance req to be created by Provost's Office
 - Include:
 - Start/ end date for research
 - External grant award documentation
 - Appropriate back-up with research plans/ intended use for gift cards
 - Gift card quantity & individual amounts

2. External Grant recipient purchases gift cards with cash, after the advance is received. Along with participant disbursement information (see #3), the itemized, original receipt of purchase must be kept and submitted to reconcile the advance.
3. Disburse the gift cards.
 - For gift cards issued **in person**, each participant must sign an acknowledgement of receipt that includes their name, email address, signature, amount received, serial number of gift card (if available) and person distributing the card. Researchers can find a pre-made [Award and Prize Form](#) that could be used for this purpose.
 - For gift cards issued **via email**, researchers will need to save a copy of the email distribution that includes participant name (when available) or participant ID, email address, amount disbursed, and serial number of gift card. The email should show who sent the email and the date.
 - *Note:* Faculty/Staff are only eligible to receive gift cards in the amount of \$25 or less. In addition to providing the information listed above (the Award & Prize Form or the documentation of digital disbursement), documents must clearly note any faculty or staff who receive compensation for research.
4. Submit gift card/incentive payment evidence to Accounts Payable within one week of completion of research. The following must be submitted to Accounts Payable:
 - Original gift card receipt (step 2)
 - Information collected documenting incentive disbursement (step 3)
 - Receipt of return of unspent funds to University Cashier (work with department administrator to get the information necessary to complete the Deposit slip to ensure the funds are returned to the correct account).