

Sul Ross State University  
Business Process Analysis – Finance Module

Process Name: Grant Monitoring

Date: 9/15/05

Time: 1:00 pm

Location: SRSU Executive Conference Room

Participants: John Young, Cindy Johnson, Anita Wright, Susan Harris, Helen Crane, Tanya Romero

Session Lead: John Young, Visio; Tanya Romero, Narrative

Narrative/Description: PI/PD and grantor agree on performance measures in proposal. PI/PD prepares a plan on how to meet time lines and objectives established in grant. In some instances PI/PD is required to present plans to an advisory committee for review. PI/PD gathers data needed to measure objectives. PI/PD uses a variety of tools for monitoring and ensuring progress reports are submitted to grantor in a timely manner and compares progress against budgetary goals. If goals are being met, PI/PD files information and documents progress and files reports if necessary. If objectives are not being met, PI/PD works with grantor to revise procedures and/or objectives. When appropriate a grant amendment or written approval is obtained from grantor.

Electronic Inputs: None

Manual/Paper Inputs: None

Key Decision Points (list all): Are objectives being met? Deadlines.

Related Policy(s): None

Interface to Other Systems: None

Web Features: None

Electronic Outputs: e-mail reporting

Manual/Paper Outputs: Reports

Customer(s): PI/PD, grantor

Regulatory Items: Grantor guidelines.

Frequency/Volume: 50 annually

Potential Break Points: Objectives not met. Deadlines not kept. Funding pulled.

Automation: None

Issues: Objectives not clearly defined and are hard to measure. Hard to meet objectives in established timelines. Difficulty working with grant subjects. Personnel turnover poses delays and inability to meet objectives.