**Action Checklist**

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| 1. Inform the Project Setup Officer (Aamna Khan – <Aamna.Khan@reading.ac.uk>) that you have received an award letter/notification from your funder |  |
| 1. Familiarise yourself with the contents of the **Managing Your Grant Handbook**    1. [Directly Commissioned Industry Handbook](https://www.reading.ac.uk/research-services/post-award-support/directly-commissioned-industry-handbook)    2. [Open Competition Grants Handbook](https://www.reading.ac.uk/research-services/post-award-support/open-competition-grants-handbook) |  |
| 1. If your grant is from an organisation with an online grants portal (e.g. UK Research Council, British Academy, Leverhulme Trust, British Heart Foundation, Royal Society, European Commission) Have you had an automated notification |  |
| 1. Identify the relevant service departments to provide support for your grant    1. e.g. HR for Recruitment    2. Research data manager for data policy development    3. Procurement for procurement/purchasing activity    4. [Research Contracts team](https://www.reading.ac.uk/research-services/research-contracts/contacts) – agreements and review/acceptance of terms and conditions |  |
| 1. Provide contact details for your co-applicant/partner institutions to your Contracts Manager in RES, if you have not already done so, so that they can work with them to put the relevant contracts, subcontracts or agreements in place |  |
| 1. Discuss with any co-applicants/partners/Collaborators that the University will need to send them a collaboration agreement and due diligence questionnaire to sign and complete – in order that they are ready to respond |  |
| 1. Contact the [Procurement](https://www.reading.ac.uk/procurement/information-for-employees/how-procurement-works/questions-for-you-to-think-about) team to arrange a subcontract if you intend to pay an organisation or person to provide a service for your project and have not named them in your application, e.g. to carry out a feasibility study or provide a data set |  |
| 1. Contact [Research Contracts team](https://www.reading.ac.uk/research-services/research-contracts/contacts) to arrange contracts/subcontracts for named organisations providing core research services. |  |
| 1. Familiarise yourself with the terms and conditions within your contract, subcontract or agreements in order that you can maintain compliance for the duration of the project e.g. State aid, document retention, start/end dates, ethics, acknowledgement of funder support, procurement, reporting etc.) |  |
| 1. Familiarise yourself with the University’s [HR](https://www.reading.ac.uk/human-resources/policies-and-procedures), [Finance](https://www.reading.ac.uk/finance/) and [Procurement](https://www.reading.ac.uk/procurement/closed/Information-for-employees) policies |  |
| 1. Purchase goods and services in compliance with the University [procurement policy](https://www.reading.ac.uk/procurement/-/media/project/functions/procurement/documents/procurement-policy-v13.pdf?la=en&hash=E15D5589982193B6F0A098CA7B063750) |  |
| 1. Speak to your departmental administrator about raising purchase orders to pay partners or subcontractors |  |
| 1. Review your monthly financial reports to check everything is correctly allocated and within budget |  |
| 1. Contact your school admin team or Research Accounts with any financial queries or concerns |  |
| 1. Speak to Research Accounts about an extension or variation to your budget Reporting. Where extensions are required please also alert RES (Project Setup Team) who will support you with this. |  |
| 1. Agree with any partners how you will monitor their performance (research and financial) |  |
| 1. Familiarise yourself with the reporting requirements of your funder, so that you are prepared for what you need to do and when (e.g. ResearchFish). If your funder uses Researchfish, register for an account |  |
| 1. Submit all requested reports on time and in the requested format ( for both Staff and students) |  |
| 1. Decide on the best resourcing option for your project |  |
| * 1. Speak to HR to begin the staff recruitment process if relevant |  |
| * 1. Speak to the Graduate School to begin the student recruitment process if relevant |  |
| 1. Inform any staff, student(s), external consultants and/or subcontractors about compliance with the terms and conditions of the funding, including providing information about allowable expenses and any reporting deadlines. |  |
| 1. Review the training needs of you, your staff and students in order to manage your grant effectively for its duration, e.g. training in financial management, reporting |  |
| 1. Ensure timesheets are completed and submitted on time, if they are required by your funder for your project |  |
| 1. Develop contingency plans in case unexpected situations arise |  |
| 1. Draw up a data management plan and decide how you will implement it during your research. Please contact the Research Data Service ([researchdata@reading.ac.uk](mailto:researchdata@reading.ac.uk))   (<https://www.reading.ac.uk/research-services/research-data-management/data-management-planning/writing-a-data-management-plan>.) |  |
| 1. Plan and implement your impact and engagement activities |  |
| 1. Read the University’s [Code of Good Practice in Research](https://www.reading.ac.uk/web/files/office-of-the-university-secretary/UCOGPR_Jun2018.pdf) |  |
| 1. Regularly review whether there are any changes which you need to inform your funder and/or partners about – speak to Research Accounts and/or your Contracts Manager in RES for advice before contacting them |  |
| 1. Contact the Doctoral Research Office to complete a suspension/extension request form if your student requires it |  |