

Research Resources

Being a Project Director

“Project Director” and “Principal Investigator” are titles used to designate people with the same management and administrative responsibilities for a grant.

The University has ultimate legal responsibility for grant/contract administration. As the University’s officially designated representative, a project director is responsible to both the University and the grant sponsor for carrying out the specific objectives of the grant or contract in compliance with the program award. When you become a project director, you become an administrator and, for example, should expect to hire and supervise employees, balance expense reports, and expend funds in compliance with the University’s and outside sponsor’s policies and procedures.

Your specific administrative responsibilities as a project director include, but are not limited to:

MANAGE the program in compliance with the statement of work, the sponsor’s guidelines, the award notice, and the budget.

- Set up systems – timelines, budgets, project plan with resources identified by task – to help you get on track and stay there.
- Periodically (e.g. monthly) set time aside to take stock of where the project is, including reviewing your timeline and budget.

REPORT progress as required by the sponsor and submit required reports as scheduled.

- Develop a good working relationship with a sponsor’s technical/administrative contact so you can manage your project sponsor’s reactions to progress reports and issues which may be of concern to him/her.
- Provide regular updates to your department head and/or dean to maintain their support for your work.
- Keep Business Services and the Office of Sponsored Projects informed so they are ready to support you when you need help.
- Set up ways (for example: spreadsheets, logs, accounting records) to track information required for interim and final reports as required by the sponsor so you don’t have to scramble to collect information at the last minute.
- Be prepared to host any site visits requested by the sponsor.

ACCOUNT for your program accurately. Always consider the program statement of work, terms and conditions, and approved budget prior to spending or committing program funds.

- Process all travel reimbursement and project operating expense requests in a timely manner; include original receipts for proof of payment.
- Record all costs accurately and completely.

CERTIFY time and effort statements on a monthly basis, if required.

REVIEW and **RECONCILE** monthly financial reports provided by Business Services.

MAINTAIN RECORDS to facilitate audit and final closeout. Auditors representing sponsors and The Texas A&M University System periodically examine the University’s records to 1) determine whether grant or contract funds were used in accordance with applicable laws, regulations, and procedures; 2) determine the accuracy of financial records and reports, and 3) make objective appraisals of the financial accounting system and internal controls. Audits may occur when a project is underway or after project completion.

All projects must be closed out according to sponsor requirements. Project records must be maintained for at least five years after close-out.

