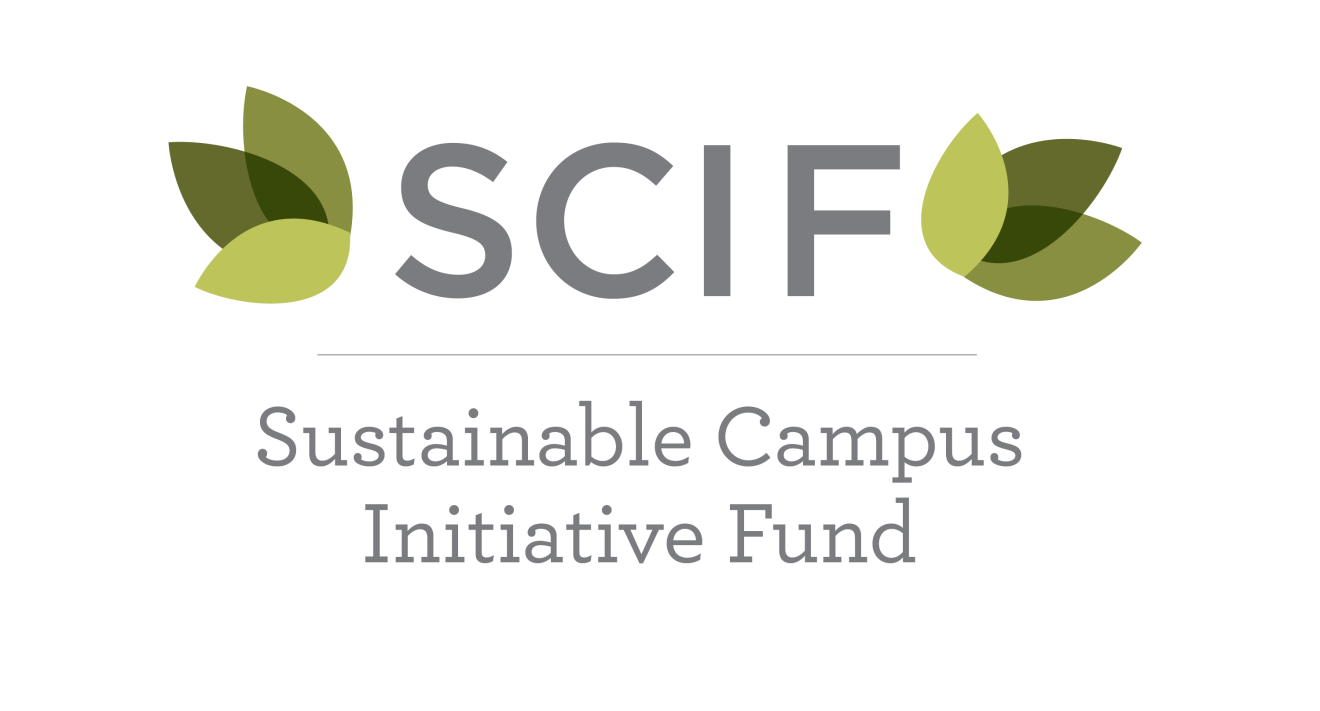
**Project Executive Handbook**



**PROJECT EXECUTIVE HANDBOOK OVERVIEW**

Congratulations; you are officially a SCIF Project Executive! This handbook will serve as a guide for implementing your project and tracking your grant activities.

Handbook Contents:  
1. Project Tracking and Accounting Guidelines   
2. Important Dates and Conditions   
3. Budget/Accounting Record Sheets

Please read the PTA guidelines and Conditions sheet carefully; it is recommended that you use the securable inside pocket to hold receipts, invoices, and other important transaction records that you will need when recording your grant administration activities.

Additional binder accessories and paper may be purchased from Office Max. Additional budget/accounting sheets may be printed from the budget/accounting sheet template located within the SCIF Canvas platform.

SCIF offers support to Project Executives throughout the application, development, and completion processes. You may reach the SCIF Coordinator via phone or email to ask questions, schedule meetings, and request resources.

Email: [emerson.andrews@utah.edu](mailto:emerson.andrews@utah.edu)

Project Executive:

Project Title:

Project Code:

Office: 801.581.7510  
Cell: 801.518.8638  
  
SCIF is located in Bu C Room 50

*The Sustainable Campus Initiative*

**SCIF PROJECT TRACKING AND FINANCIAL ACCOUNTING GUIDELINES**

As a Project Executive, you are required to maintain accurate records of project/financial activities whenever possible. Follow the guidelines below to ensure that you, your project advisor, and your financially responsible department are able to administer and track your grant with ease and accuracy.

**TRACKING/RECORDING TRANSACTIONS:**

1. SAVE ALL RELATED FORMS/MATERIALS (includes receipts, purchase orders, invoices, etc.)
2. SCAN AND SAVE COPIES OF ALL RELATED FORMS/MATERIALS (your responsible financial department and/or the SCIF Coordinator can help you with this if you do not have direct access to a scanner; you will be submitting these documents to the SCIF Coordinator along with your final report)
3. If you are not sure whether something should be saved, SAVE IT! ☺

**PURCHASING:**

1. SALES TAX: the University of Utah, as a public university, does NOT pay sales tax. This means that if you purchase something on your own for your project and wish to be reimbursed, you will NOT be compensated for sales tax on your receipts (an employee who allows you to be reimbursed for sales tax may lose their purchasing privileges). Avoid this issue by:
   1. Meeting with your responsible financial department representative to purchase project materials with a University Purchasing Card (PCard)
   2. Requesting a purchase order for use in-store (purchase orders must be approved by your responsible financial department and may only be used for project-related materials; any unauthorized purchases may result in the loss of your SCIF grant)

**REIMBURSEMENTS/PAYMENT TIMING:**

1. WORKING WITH YOUR RESPONSIBLE FINANCIAL DEPARTMENT/SCIF COORDINATOR: your responsible financial department (RDF) contact and the SCIF Coordinator have multiple projects requiring payment transactions and require advanced planning to address SCIF project purchases. Please use the following time frames for payment request/reimbursement submissions:
   1. PCard Transactions – schedule a meeting with your RFD contact for PCard purchases to ensure that the right materials are ordered; consolidate orders whenever possible, and schedule meetings at least one week in advance of when materials should be ordered (additionally consider shipping times when applicable)
   2. Reimbursements – due to the volume of reimbursements submitted to the Accounts Payable department, many reimbursements take three weeks or more to be processed. Please meet with your RFD contact to submit a reimbursement request at least three weeks before you would like to be reimbursed. You will need:
      1. All receipts related to the total amount for reimbursement
      2. To sign the Payment Request for Reimbursement form
   3. If you feel uncomfortable with the waiting period for reimbursements, please utilize your RFD contact for PCard purchases whenever possible.

**The SCIF Coordinator is available to help with any questions you may have regarding project tracking and grant administration, and can offer advice for project tracking methods and systems; call 801.581.7510 or email** [**emerson.andrews@utah.edu**](mailto:emerson.andrews@utah.edu) **for more information.**

**Important Dates and Conditions**

The Sustainable Campus Initiative Fund receives money from student fees; certain conditions exist to support activities affecting the greatest number of students on campus and ensuring that funds are used in a sustainable and impactful manner.

GRANT CONDITIONS: your grant is subject to the conditions outlined in your SCIF Contract and the SCIF Bylaws. These conditions require that you:

- Use your grant for the purposes, materials, and services that were approved by the Allocation Committee;

- Maintain accurate records of project-related purchases;

- Submit all required reports and materials to the SCIF Coordinator at the completion of your project/project’s funding cycle (for ongoing projects);

- Return any and all unused funds to SCIF at the end of your funding cycle (exceptions given for accepted grant extension requests);

- Implement and complete your project to the best of your abilities OR find a substitute Project Executive in the event that you can no longer implement/complete the activities associated with your grant yourself.

In the event that you are unable to complete your project in accordance with the outlined conditions, contact the SCIF coordinator for approval and direction. SCIF reserves the right to revoke grant awards and/or exclude projects from publication in the SCIF Annual Report should any of these conditions not be met.

CHANGES TO PROJECT SCOPE/IMPACT, AND/OR GRANT PURPOSE: SCIF recognizes that throughout the implementation process, projects may have to adjust their scope and related activities to account for unforeseen obstacles, changes outside of the PE’s control, or issues of sustainability. Projects, however, are awarded grants based on the design of the proposal at the time of the allocation committee meeting. Should you be concerned that your project’s activities may/will change from those approved by the Allocation Committee, submit a Grant Change Request Form (found on the Canvas Course) to have changes approved. In some cases, the SCIF Coordinator may ask that you submit a progress report along with the Grant Change Request form.

Grant Change Request Forms should be submitted as soon as possible; forms will not be accepted retroactively. Contact the SCIF Coordinator if you are unsure if you ought to submit a form for your project.

PROGRESS REPORTS AND POST-PROJECT REPORTS: Submission of reports is a condition of your grant. The dates that your reports are due are outlined on the first page of this handbook. In the event that you are not able to submit a progress report on time, contact the SCIF Coordinator for further instructions.

COMPLETING YOUR PROJECT: While some SCIF Projects occur within the period of a year (i.e. within your funding cycle), others may be designed to continue beyond the use of the initial grant. Either way, you are required to submit a post-project report at the end of your funding cycle and report how your grant money was used. If you have any funds left over, they will need to be returned to SCIF via your Responsible Financial Department (RFD):

- if SCIF is your RFD: funds will be reabsorbed into the SCIF account

- if your RFD is another University Department: schedule a meeting with your RFD contact to identify all remaining funds and transfer them back to the SCIF account (your RFD contact should connect with the SCIF Coordinator for account information).

EXTENDING YOUR GRANT: In rare cases, PE’s may require an extension of the funding cycle beyond the standard period of a year to complete their project. To apply for a grant extension, you will need to submit the following materials no later than one month before the end of your funding cycle:

- A Grant Change Request Form requesting to extend the cycle of

funding;

- A progress report detailing current project progress and the anticipated date of completion.

The SCIF Coordinator may also have you submit a current line-item budget or other record of grant use to better understand/account for past activities.

APPLYING FOR FUTURE GRANTS: SCIF accepts proposal submissions from past Project Executives. If you are interested in applying for another grant, contact the SCIF coordinator to discuss potential project ideas.

SCIF AS A LEARNING GRANT: SCIF Project Executives are often pioneers of sustainability on campus, and design and create projects that have not been previously conceptualized or implemented. Changes and obstacles to activities are often more probable than possible, and flexibility as well as critical thinking are required to successfully navigate adjustments to SCIF projects.

It is encouraged that you keep your activities transparent to ensure that any adjustments are understandable and reasonable. The SCIF Coordinator is always available to make recommendations based on your project’s trajectory, and help you find solutions to obstacles that arise during the implementation and completion processes. Additionally, you should contact your project advisor for guidance, advice, and support throughout your grant cycle.

**GRANT ACTIVITIES/PURCHASE LOG SHEET**

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