Finance & Operations Policy FO-ORA-10
Drawdown Policy for Sponsored Program

The purpose of this policy is to outline the drawdown process for funds used for sponsored programs. This policy applies to awards received from federal, state, local and all other sponsors. The Office of Research Administration will oversee and monitor the process per all applicable guidelines.

SHSU’s Office of Research Administration (ORA) draws down funds that support activities managed by ORA according to the granting agency requirements and contract terms. The ORA grant accountant is responsible for performing these duties.

Funds are drawn down on a cost reimbursable basis unless otherwise stated in the agency contract.

Reviewed by:  TSUS
              Cabinet
              Susan Hurley, Research Administration Manager (2/4/19)
              Amanda Withers, Controller (4/24/19)

Next Review:  As needed
PROCEDURES TO POLICY FO-ORA-10

1. Sam Houston State University (SHSU) can only draw down funds that have been expensed on a project.

2. Expenses must meet the following criteria:
   a. Are allowable according to the principles of Uniform Guidance
   b. Are directly related to the project objectives
   c. Are included in the project plan

3. Expenses must be documented in the official records of the University. The ORA will request reimbursement from sponsors according to sponsor requirements as detailed below.
   a. Accounting reports are produced to identify the drawdown amount.
   b. The ORA accountant reviews the transactions for allowability per all applicable guidelines and prepares the drawdown request according to the granting agency’s procedures.
   c. The ORA accountant submits the request via the appropriate method per the granting agency’s process.