Running your project

As Principal Investigator (Project Lead), all research/commercial activity, within the University should be conducted with: • honesty • rigour • transparency and open communication • care and respect • accountability (*).

Directly Incurred Staff

- As per the **staff budget** on Worktribe, this is the amount of funds that the University can claim from the funder – this is made up of salary costs, employer's national insurance contribution, and employer's contribution to the pension scheme.
- The budget determines the **contract** that should be issued to the researcher, %FTE, duration and the Grade/spine point – this ensures that the cost of employment should be covered by the approved funding.
- If staff are being appointed on short term contracts, and they may be working part time, they are still entitled to a pro rata **public/annual leave allowance** - if they don't take this leave within the duration of the contract, they will be paid for the accrued holidays, this will be an additional cost to the project - this is not budgeted for in the project, as it is assumed that holidays will be used within the duration of the contract.
- Please liaise with your School Research and Innovation Officer, as they will be able to assist with the staffing approvals forms etc. to get the **recruitment** process started
- If you already have an **existing researcher** working on another project, and some of their time should be charged to the new project, again, please inform your School Research and Innovation Officer and they will ensure that HR/Payroll are informed of the this, so that monthly salary costs will be charged to the project for reporting purposes.
- Some funders require **timesheets** to be kept to justify the work/claim, therefore, if required for your project, please complete timesheets regularly and ensure that they are approved on a monthly basis by your line manager. Once complete, please send to the School Research & Innovation Officer for retention and they will forward on to the Project Finance Officers at the claim stage.
- Also, please ensure that a data management plan is uploaded to you project on Worktribe and then the work conducted by the project team can be securely stored on the University's server (X:Drive)

Directly Incurred Costs

Spend requests should be initiated through the School Commitment Spend System, this will allow spend requests to be approved by the appropriate people, and once approved, a notification will be sent to the 'approved spenders' who will action the request.

Purchases should be made throughout the duration of the project or there is a risk that 'late' purchases may not be processed in time to be included in final claims etc., and the costs will not be claimable from the funder.

- **Consumables and other costs**, should be procured through the appropriate channels, and should be for the best value for money
- **Travel and subsistence**, please refer to the travel policy here for full guidance. Travel should be booked using the University's travel provider, and expenses claims should be submitted in a timely manner, and supporting receipts provided to substantiate the claim

- **Equipment (non IT) purchases** - follow the guidance issued by Procurement, currently recommended that purchases within the following bands

  £1 to £5k no quotes

  £5k to £12.5 minimum of 2 quotes (email, screenshots etc.)

  £12.5k - £25k minimum 2 quotes, and completion of Pre requisition form here

  For purchases over £25k please contact the Procurement team Procurement@napier.ac.uk

- **Equipment IT purchases**

For any IT equipment you need to purchase you must contact IS using one of the forms to contact them here for advice and to ensure the equipment meets all of the University specifications

Equipment purchased using external funding, is owned by the University or the funder until the completion of the project and then the ownership reverts to the University, this means that the equipment is not the property of staff working on the project and should be returned to the University at the end of the project

Partners Costs

- If the University is lead partner and we hold all the budget from the funder, it is the University's responsibility to reimburse the other institutions/partners in a timely manner – it will be a requirement to ensure that a collaboration agreement is in place and signed by all parties, then the School Research & Innovation Officer will initiate a purchase order to be issued to the partners to allow them to submit invoices for their share of the funding (the normal process is to receive quarterly invoices from the partners for the costs that they incurred in the period).

Directly Allocated Costs

- If you have been funded, any of the following - **Directly Allocated staff costs, Estates and Indirect Costs** by the funder, Project Finance Staff will process these on a monthly basis, pro rata over the duration of the award (for the majority of grants), therefore you do not need to do anything against these budget categories.
- Also, if your grant is **partially funded (80% fEC)**, again the Project Finance staff will do all the necessary adjustments with regards to ensuring that the University makes the appropriate contributions.

Reporting/Financial reporting/milestones

- If you require a **spend report** to see how much budget you have remaining, please contact the School Research & Innovation Officer, or the Project Finance Officer and they can prepare a report for you.
- Also, Project Finance Officers will prepare all **financial claims/invoices** for Research projects for submitting to the funder, and the School Research & Innovation Officer will ensure invoices are issued to clients for commercial projects. These will be created as a milestone against the project on Worktribe, so you can clearly see when key dates are
- **Reporting milestones** will also be added to Worktribe, so that you will be notified as to when reporting is required to be submitted to the funder (period reports/final reports etc.)

Also, please ensure that you follow the terms and conditions of the funder, if you are unsure about anything, please contact either the Research & Innovation Support Officer or the School Innovation & Support Officer, we can check funders T&Cs to see whether or not it is possible to move funds between budget headings if you require additional funds against one budget category, but you are underspent in another category, whether or not you should seek an extension to your project if staff have left and you need to recruit someone else etc.

*All research projects carried out at Edinburgh Napier must comply with the University's Code of Practice on Research Integrity