

Standard Operating Procedure (SOP): Burn Rate Monitoring

Purpose

The purpose of this SOP is to establish the procedure for burn rate monitoring.

Background

To ensure maximum research expenditures in the current fiscal year, the Post Award Administration Office (PAA) created a process in the Summer of 2023 to monitor awards with slow (S) and very slow (S-) burn rates. PAA worked with the Research IT Office to create the required data set for a mail merge email notification.

Procedure

The **Office of Sponsored Projects (OSP)** will identify all active awards with slow (S) or very slow (S-) burn rates as defined by the Burn Rate Data Download Center in the Expenditure Dashboard.

OSP will separate the list of active awards identified into individual lists for each Research Administration Team.

OSP will work with the **Research IT and Business Intelligence Office (Research IT)** to:

- 1) Prepare the individual lists of identified activities for the mail merge notification.
- 2) Update the language in the mail merge e-mail message as appropriate/necessary.

OSP will send out the e-mail notifications to respective **Principal Investigators (PIs)** and carbon copy the respective general RA Team email address quarterly then bi-weekly in the summer.

The **Research Administration Team (RA Team)** ensures all budgeted expenses on the identified awards are posted to the account. For awards with slow/very slow spend, the RA Team will coordinate with the PI and respective Business Service Center to ensure all processes are completed to post the expense to the account.

To monitor burn rate of all awards:

1. Log into the Expenditure Dashboard.
2. Navigate to 4.4 BurnRate Data Download Center.
3. Filter report for the respective College/VP Unit using Data Filters on the right side of the page.
4. Navigate to the 3 dots when hovering over the data table and select "Export Data".
5. Filter excel file by desired criteria (e.g. Months Remaining, Zone, Department, etc).