



AcceleratorApp
Software for Accelerator & Incubators

2026 EDITION

Research Grant Lifecycle

From PI Submission to Compliance Reporting

A practical reference for research offices, technology transfer offices, and funding councils managing the full research grant administration lifecycle.

Research funding is multi-stage, multi-stakeholder, and compliance-heavy by design.

Research grants are unlike most other funding programs. The people who apply are not entrepreneurs or startups. They are principal investigators with active research programs, faculty with governance obligations, and TTO teams managing IP alongside funding. The institutions they belong to have their own governance requirements that sit above the funding program.

This creates an administration challenge that most grant management software was not built to handle. A platform designed for community grants or innovation challenges handles application intake well. It typically fails at multi-stage approval governance, IRB and ethics compliance, milestone structures for research deliverables, and the kind of institutional reporting that a VP of Research, a development office, and an external funder all want simultaneously in different formats.

“The platform fails after submission: at governance, compliance, milestone tracking, and the simultaneous reporting demands of three different stakeholder groups.”

WHAT THIS GUIDE COVERS

This guide maps the full research grant lifecycle as it operates in practice: from PI submission through peer review, multi-stage approval, award, post-award compliance, milestone tracking, disbursement, and institutional reporting. For each phase, it identifies what a grant management platform needs to support and what to evaluate when choosing or replacing one.

THIS GUIDE IS FOR

Research administrators and grants officers who manage the system, not just the program. Program coordinators setting up new platforms or replacing legacy tools like Cayuse, InfoEd, or custom portals. TTO managers administering proof-of-concept and pre-seed funding alongside IP licensing workflows.

Usually the best-served phase by existing tools, but still with gaps worth knowing.

PI SUBMISSION

The PI submission experience sets the tone for the entire program. A well-designed submission portal collects structured, consistent information. A poorly designed one collects PDFs that someone has to read manually.

Common requirements across research funding programs:

- Project abstract and plain-language summary
- Methodology and approach narrative
- Budget breakdown with justification
- Team composition and CVs
- Ethics and IRB status declaration
- Conflict of interest disclosure
- Data management plan (for programs requiring it)
- Supporting documents: preliminary data, letters of support

→ What to evaluate: Can the form builder handle file uploads, conditional fields (show IRB status only if research involves human subjects), and multi-section layouts? Can PI portals be white-labeled with your institution's branding?

A NOTE ON VIDEO SUBMISSIONS

Some research programs, particularly those targeting early-career researchers or spinout-focused programs, are moving toward short video submissions alongside written proposals. Check whether your platform supports video file uploads and in-platform video review before your next cycle.

ELIGIBILITY SCREENING

Before applications reach reviewers, eligibility criteria should be checked automatically: institution affiliation, career stage, project type, geographic eligibility, previous grant history. Platforms that check these before routing to reviewers save significant review time at scale.

→ What to evaluate: Can eligibility rules be configured by program staff without developer involvement? Does the platform communicate automatically with ineligible applicants using a templated message?

Peer review is where research grant administration gets complex.

REVIEWER ASSIGNMENT

Assigning reviewers requires balancing expertise match, conflict of interest, and reviewer workload. At scale, with hundreds of applications and dozens of reviewers, manual assignment becomes a coordination problem.

- Expertise tag matching between reviewer profiles and application topics
- Load-balanced assignment based on reviewer capacity limits
- COI declaration workflow before reviewers see any applications
- Automated routing of conflicted applications away from affected reviewers

BLIND REVIEW CONFIGURATION

Some programs require double-blind review. Others run named review. Some run blind for the initial screening round and named for the committee stage. Your platform needs to support whichever model your program requires, configurable per program and per review stage.

SCORING AND SCORING RUBRICS

Research grant scoring rubrics are typically multi-dimensional: scientific merit, feasibility, team capability, broader impact, budget appropriateness. Each dimension may carry different weight. Platforms that support only a single aggregate score are not built for research evaluation.

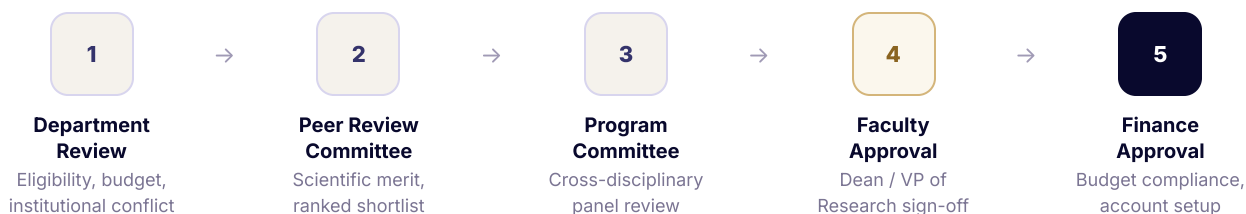
→ What to evaluate: Can criteria be weighted differently? Can reviewers add qualitative comments alongside numeric scores? Is the comparative view of scores across applicants available before the committee meeting without manual aggregation?

THE COI PROBLEM AT SCALE

At a research council running 200+ applications per cycle, manual COI management is untenable. Reviewers who declare a conflict after seeing application content have already compromised the review. A structured COI declaration workflow completed before any application access is the only defensible approach.

Most research funding decisions involve 3 to 6 distinct approval stages.

Research funding decisions are rarely made by one person or one body. A platform that treats the entire evaluation as a single workflow cannot support the governance structure that research institutions actually operate under.



WHAT "CONFIGURABLE APPROVAL WORKFLOWS" ACTUALLY MEANS

Ask any vendor to show you a three-stage approval chain where Stage 1 reviewers cannot see Stage 3 decisions, and Stage 3 participants can see aggregated Stage 2 scores but not individual reviewer attributions. If the platform cannot demonstrate that, its RBAC is not fit for research governance.

DECISION TRAIL REQUIREMENTS

At every stage, the decision trail must record: who made the decision, when, what the basis was, and whether any COI declarations were made. This record may be subject to institutional audit, external funder audit, or (in some jurisdictions) freedom of information requests. Field-level logging is the standard that makes these reviews tractable.

→ What to ask: Can the platform produce a complete decision audit trail for a single application, showing every reviewer action and timestamp across all stages, in one exportable record?

Post-award is where most research grant platforms stop supporting you.

RECIPIENT ONBOARDING

When a grant is awarded, the PI moves from applicant to recipient. The transition should be structured: allocation confirmation, formal award letter, project account setup, compliance checklist, and milestone planning. On most platforms, this transition requires manual data re-entry or a tool switch. On a full-lifecycle platform, the applicant record becomes the recipient record without duplication.

MILESTONE STRUCTURES FOR RESEARCH PROGRAMS

Research grant milestones are different from startup program milestones. A milestone structure for a 3-year research grant might have 8 to 12 milestones spread across the funding period with uneven timing and evidence requirements.

- Milestones defined with specific due dates, not just quarterly intervals
- Different evidence types per milestone: report uploads, data outputs, publication links, presentations
- Milestone submission by the PI with reviewer workflow for the grants office
- Status visible in the portfolio grid without requiring the grants officer to contact each PI

IRB AND ETHICS COMPLIANCE AS A DISBURSEMENT GATE

For research programs involving human subjects, animal studies, or biosafety requirements, IRB and ethics approval is a precondition for fund disbursement, not just a checkbox. A compliance-gating disbursement workflow means the platform will not allow the disbursement approval process to proceed until IRB approval is recorded and verified.

THE DATA MANAGEMENT PLAN COMPLIANCE LOOP

Many funders now require a DMP as a post-award compliance requirement. The DMP is submitted at application, revised at award, and may require updates mid-grant. A compliance template that tracks DMP submission, review, and approval at each stage keeps this loop structured rather than ad hoc.

International collaborations introduce currency complexity that most platforms are not built for.

Joint research programs across borders are increasingly common: a UKRI-funded program with French and German co-investigators; an NSF collaboration with Canadian and Australian institutions; an ERC grant with Southeast Asian field sites. Each co-investigator institution may receive funding in a different currency. Without native multi-currency support, this complexity is absorbed by the grants officer's spreadsheet.

WHAT NATIVE MULTI-CURRENCY MEANS IN PRACTICE

Every contribution, allocation, and disbursement is recorded in the currency it was committed in. Reporting consolidates in the program's home currency using live exchange rates. The difference between the committed amount and the disbursed amount in home currency due to FX movement is tracked and reportable.

→ What to ask a vendor: "Show me a disbursement record in EUR for a grant committed in GBP, with the home-currency equivalent shown at both the commitment date and the disbursement date." If they cannot demonstrate this, their multi-currency support is cosmetic.

FX MOVEMENT AND BUDGET REPORTING

For multi-year international research grants, FX movement between the commitment date and the disbursement date can represent a material difference in reported grant value. Research offices that report to funders in the funder's currency need this tracked automatically, not reconciled manually at year-end.

COMMON MULTI-CURRENCY SCENARIOS

PROGRAM TYPE	CURRENCY COMPLEXITY
Domestic university grant	Single currency, no FX complexity
International collaboration	2 to 4 currencies, periodic FX reconciliation
Multi-country research council	5+ currencies, continuous FX tracking
Development-funded research	Grant in USD, disbursement in local currencies

Three different stakeholder groups want three different reports from the same data.

VP of Research

Portfolio view: active grants, total committed funding, milestone completion rates, funding by school or department, overhead recovery rates. Monthly or quarterly frequency.

Development Office

Gift and grant reporting aligned to donor/funder cycles. Outcomes: publications, patents, spinouts, jobs created, IP licensing revenue. Annual, formatted for donor stewardship.

External Funder

Program-specific reporting against grant agreement metrics. Milestone completion evidence. Expenditure against budget. Deviation explanations. Per funder's specified format.

WHAT A PLATFORM NEEDS TO SUPPORT

- Configurable dashboard views per stakeholder role, read-only for VPs, full access for grants officers
- Exportable reports in standard formats: CSV, PDF, Excel
- Portfolio metrics tracked over time, not just current state
- Milestone completion evidence attached to the record for funder audit
- Budget vs actuals tracking per grant

ON REPORTING FREQUENCY VS REPORTING FORMAT

The VP of Research and the development office often want the same underlying data in entirely different formats. A platform that produces one standard report forces the grants office to reformat manually. Look for configurable dashboards with role-specific views and flexible export formats.

COMMON INSTITUTIONAL REPORTING METRICS

Number of active grants

Total funding under management

Overhead recovery by department

Milestone completion rate

Time from award to first disbursement

Post-award reporting compliance rate

Spinout creation rate

Publications per grant cycle

Weighted toward post-award and compliance capabilities, which are the most commonly undersupported.

PRE-AWARD

- ☐ PI submission portal with conditional logic fields
- ☐ IRB and ethics status declaration in application form
- ☐ COI declaration workflow before reviewer access
- ☐ Multi-stage review with configurable access per stage
- ☐ Weighted scoring rubrics per program
- ☐ Blind and named review configurable per stage
- ☐ Batch reviewer assignment with load balancing
- ☐ Decision trail logging at every approval stage

GOVERNANCE & COMPLIANCE

- ☐ ISO 27001 certification
- ☐ GDPR-compliant with documented DPA
- ☐ FERPA considerations for student researcher data
- ☐ Data residency options for EU-funded programs
- ☐ Log retention meeting your funder's audit requirements

POST-AWARD

- ☐ Accepted applicant transitions to recipient without data re-entry
- ☐ Milestone structures with configurable due dates and evidence types
- ☐ IRB and ethics compliance as a disbursement gate
- ☐ Data management plan tracking as a compliance requirement
- ☐ Multi-currency with live FX for international collaborations
- ☐ Budget vs actuals tracking per grant
- ☐ Reporting dashboards configurable per stakeholder role
- ☐ Field-level audit trail on all post-award entities

LEGACY MIGRATION

Research offices on Cayuse, InfoEd, or a custom portal often assume migration is too complex. In practice, migrating historical grant records adds 2 to 4 weeks to implementation but is tractable with the right data export from the legacy system. Ask any vendor for their legacy migration process before assuming a switch is infeasible.

Five questions that reveal whether a platform is genuinely built for research administration.

1 Can you show me a three-stage approval chain where each stage has different reviewer access levels, and where a reviewer at Stage 1 cannot see the scores from Stage 2?

This tests whether the platform's RBAC is genuinely configurable or just role-switching with fixed permissions. Research governance requires stage-specific access. Platforms that cannot demonstrate this will require workarounds.

2 What happens when a PI attempts to submit milestone evidence before their IRB approval is recorded as complete?

This tests whether compliance blocking is a workflow enforcement feature or a dashboard warning. For research programs subject to ethics oversight, a warning that can be dismissed is not sufficient.

3 Show me a multi-currency grant where the commitment is in GBP and the disbursement is in EUR, with both values visible alongside the exchange rate used.

This tests whether multi-currency support is native or a reporting add-on. Native multi-currency tracks in original currency and converts automatically. Reporting add-ons require manual FX input.

4 How does the platform handle a grant where the same PI has applications in three different programs simultaneously, with different review stages and compliance requirements in each?

This tests multi-program isolation and RBAC at the program level. A grants office managing 5 programs with overlapping PI portfolios needs each workflow to be independent.

5 What does the data export look like if we end the contract, and what historical record do we retain of closed grants?

Research records may need to be retained for 7 to 10 years post-grant for audit purposes. A platform that cannot produce a structured export of historical grant records creates a data continuity risk at contract end.

AcceleratorApp is a grant and program management platform trusted by over 200 organizations across 6 continents, including universities, research councils, and university-backed incubators and TTO programs.

The platform manages the full research grant lifecycle: PI submission, peer review, multi-stage approval workflows, milestone tracking, IRB and ethics compliance gating, multi-currency disbursement approvals, and institutional reporting.

USED BY RESEARCH-ADJACENT PROGRAMS AT

University of Toronto · UCD Mission · and research programs at universities and research-linked organizations globally.

AcceleratorApp manages approval workflows, milestone records, compliance enforcement, and disbursement authorization trails. Actual payment processing is initiated by your grants accounting team through your institution's existing financial systems.

GET STARTED

Book a demo: acceleratorapp.co/en/demo

See pricing: acceleratorapp.co/en/pricing/funding

Contact: hello@acceleratorapp.co

PLATFORM HIGHLIGHTS

- Multi-stage approval workflows configurable per program, no development required
- IRB and ethics compliance as a disbursement gate
- Field-level audit trail on every entity
- Native multi-currency with live FX
- Granular role-based permissions per program stage
- ISO 27001 certified · GDPR-compliant
- White-label with institutional branding
- Launch in 2 to 3 weeks



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