PROPOSAL DEVELOPMENT PROCESS

Grants Development Office

- Reviews newsletters, Federal Register, sponsor guidelines for grant opportunities appropriate to Cal Poly Faculty
- Maintains SPIN-PLUS database of funding opportunities
- Discusses (meetings, phone) with Sponsor representatives the expertise available at Cal Poly
- Announces funding opportunities
- Sends memos to faculty with information /guidelines
- Sets up meetings of interested faculty and sponsors

Project Director/PI

Has idea for research or project - needs sponsor



GDO

Assists with sponsor search and suggestions for making idea fit funding source



Project Director/PI

- Decides on sponsor
- Reviews guidelines
- Drafts proposal

Project Director/Principal Investigator

- Is approached by company or agency to do a project
- Determines funding program based on GDO memo, or other source
- Reviews guidelines/contacts sponsor
- Needs to request augmentation or continuation of existing grant

Drafts Proposal



Grants Development Office

- Reviews draft(s) for style/structure/complicance with guidelines & university policies
- May discuss project revisions to increase fundability
- Contacts sponsor as needed to clarify guidelines
- Assists with identifying campus contributions (e.g., assigned time)
- Works with Project Director to develop and finalize budget
- Prepares sponsor forms/certifications/cover letters.etc.
- Prepares Proposal Approval Form for pre-submission campus approval.



Project Director

- Obtains academic approval signatures
 - Department Head and Dean
 - Additional Deans as appropriate
 - Other (e.g. Continuing Education, Facilities)



Grants Development Office

- Routes Proposal Approval Form (PAF) through administrative approvals
- Obtains any other necessary signatures on sponsor's forms
- Prepares proposal for final submission copies, etc.
- Mails proposal (regular, Federal Express, UPS, Fax, or e-mail)
- Sets up proposal file and follows up with sponsor

Grant or Contract to be Awarded

- Identifies for negotiation any Intellectual Property issues, such as: Patent/Publication Rights
- Other concerns
- Forwards documents to Corporation for negotiation and signature; reviews and follows up on current and pending report for final contract execution
- Coordinates with Corporation on establishing an account
- Updates grants' database for monthly and annual reports, etc.
- Maintains post-award liaison (e.g. revisions and agumentations, changes to scope of work, or personnel, etc.)

Proposal Not Funded

- Discusses review with Project Director/ Principal Investigator
- Offers suggestions and assistance for resubmission (or another Sponsor)
- Continues to send information about related funding opportunities