



IDENTIFICATION & INITIAL STAGES

DOD or PI notifies CFR Director of a grant opportunity

CFR reviews grant announcement: ensures eligibility, submission limitations, & verifies campus project aligns with Funder's mission & funding priority

Grant submissions are managed collaboratively between CFR and College/Department/Program to ensure:

- Accuracy in submitted documents
- Adherence with University and Foundation policies
- Coordination of multi-disciplinary grants
- Collaboration with Research & Sponsored Programs, if required.

DOD or CFR opens a New Opportunity

- Determines assignment type – Prospect Manager or Team Member
- Indicates the Status & Gift Type
 - Grant Cultivation
 - Grant LOI
 - Grant Written Proposal
 - Gift Type – Grant (not cash)

DOD & CFR determine who else needs to be involved in grant preparation & together hold initial preparation meeting, engaging:

- PI or Program Director
- Division/College Dir of Finance & Operations (DFO)
- Grants officer
- Other team members

PREPARATION

CFR will provide assistance with:

- Identifies proposal components
- Supports with managing grant timeline
- Assists with preparation and review of proposal
- Assists with budget preparation
- Reviews & edits narrative/budget and prepares for successful proposal submission
- Collects CSUN Foundation financial and board documents
- Verifies all required documents have been obtained & uploaded
- Ensures College level approvals have been obtained
 - PI
 - Department Chair or Program Director
 - Division/College Finance Manager
 - Dean / Division VP
- CFR Director reviews all proposals prior to submission
- CFR Director sends budget documents to Foundation CFO for review and approval for all proposals prior to submission
- Foundation CFO signs all proposals requiring authorized signature prior to submission

SUBMISSION

CFR will provide assistance with:

- Uploads documents for electronic submissions
- Mails hard copy if required
- Updates Status and Records in RE: LOI or Proposal was submitted with submission date
- Ensures a PDF copy of final submitted LOI or proposal is submitted to Advancement Services for upload in Raiser's Edge (RE)
- When grant is awarded, ensures copy of grant agreement is reviewed and signed by CFO and a copy is uploaded in RE
- Ensures gift is linked to grant opportunity in RE
- Ensures grant report due date is recorded in RE Actions - Next Step POST AWARD REPORTS
- CFR Director reviews all post-reports and sends to Foundation CFO who reviews and approves all post-budget reports. Foundation CFO collaborates with Division/College Finance Manager on financial reports.