

# PI's PROPOSAL CHECKLIST

PI: \_\_\_\_\_  
Sponsor: \_\_\_\_\_  
Deadline: \_\_\_\_\_

## 1. FORMULATE THE IDEA

- Develop hypothesis, or project goals.
- Identify skills, expertise needed to meet goals.  
Identify potential collaborators.
- Draft abstract/summary.

## 2. IDENTIFY FUNDING OPPORTUNITIES

- Visit ORSP website to use SPINS to search for government and private opportunities:  
<http://www.csun.edu/research-graduate-studies/funding-opportunities-landing-page>
- Visit websites of specific sponsors. See ORSP website:  
<http://www.csun.edu/research-graduate-studies/search-grants>
- Obtain and read grant/proposal guidelines.  
How can your proposed idea support the goals of the sponsor?
- Discuss with CSBS Grants Officer (Frances Solano, ext. 6135) for guidance in matching the proposed project to sponsor goals.
- Contact ORSP Grants Coordinator (Stefanie Friesen, ext. 2901) to indicate intent to apply and any special application instructions.
- Contact sponsor's Program Officer to assure that proposed project meets goals/needs of the sponsor.
- Draft specific aims and methodology.

## 3. DRAFT BUDGET / INITIATE SUBCONTRACT DOCUMENTS

- Contact ORSP Grants Coordinator (Stefanie Friesen, ext. 2901) to assist in estimating the following:
  - Length of time to complete project.
  - Effort, salaries and benefits for each person.
  - Subcontract costs for external collaborators.
  - Equipment, materials and supplies
  - Travel
  - Indirect costs (NOTE: Any projects budgeted at less than 45% IDC must be approved by Director of ORSP)
- Contact ORSP Grants Coordinator (Stefanie Friesen, ext. 2901) to initiate documents for external collaborators:
  - Statement of work
  - Budget and budget justification
  - Subrecipient Commitment Form  
[http://www.csun.edu/sites/default/files/Subrecipient\\_Compmitment\\_Form.pdf](http://www.csun.edu/sites/default/files/Subrecipient_Compmitment_Form.pdf)
  - Other documents as required.

## 4. EARLY NOTIFICATIONS REQUIRED

- If private foundation, submit request for clearance to CSBS Grants & Contracts Officer (Frances Solano, ext. 6135).

Grants & Contracts Officer will obtain clearance from CSUN Foundation to proceed.

- Prepare and sign Grants Data Form (GDF). See <http://www.csun.edu/sites/default/filesF-dgf4-23-09.pdf>  
Attach: (1) Abstract, (2) Budget, (3) Budget Justification
- (4) Conflicts of Interest (COI) Form.
- (5) If sponsored by PHS agency (e.g. NIH), complete COI Supplement.
- At least 3 weeks prior to deadline**, discuss with your department chair.  
Discuss any needs for changes in curriculum, cost-sharing, release time, additional space/equipment.
- Obtain chair signature on GDF.
- At least 14 days prior to deadline**, submit signed GDF to Grants & Contracts Officer for review and Dean's signature.  
Attach: (1) Abstract, (2) Budget, (3) Budget Justification
- At least 14 days prior to deadline**, if your project includes human participants,  
contact CSUN Compliance Officer (Kat Sohn, ext. 2901) in ORSP for preliminary IRB guidance.

## 5. FINALIZING PROPOSAL.

- Communicate with subcontractors to finalize scope of work and budget.  
ORSP Grants Coordinator will communicate with subcontractors to obtain required certifications.
- Complete all sections of grant application as instructed by sponsor.
- At least 4 days prior to deadline**, forward completed final proposal to ORSP Grants Coordinator.  
ORSP will submit proposal package to sponsor.

## 6. SUBMITTING THE PROPOSAL TO THE SPONSOR

- Communicate your availability to the ORSP Grants Coordinator for any questions or last-minute issues.
- Work with ORSP Grants Coordinator to determine who will submit to the sponsor.
- After proposal is submitted, begin writing protocol for IRB approval (if human participants are involved).  
<http://www.csun.edu/research-graduate-studies/submission-deadlines-and-meeting-dates>  
(It may take 30 days for final IRB approval, which must be obtained prior to award being granted).