

PROPOSAL PREPARATION

Revised December 21, 2022

This list is meant to be a general guideline.

Basic Steps of Proposal Preparation:

1. PI informs you of intent to submit a proposal.
2. Complete the [Proposal Intake Form](#).
3. Find website for agency and instructions for proposal preparation and read/review all instructions very carefully, highlighting any unusual instructions/restrictions.
4. Determine a [timeline for preparation and submission](#).
5. For DOM DRA submissions, submit [online proposal notification form](#).
6. Contact Key Personnel and Subawards for BioSketches and other required documents.
7. Once final proposal title is determined, begin working on Internal Documents and obtain signatures of PI and Key Personnel.
8. Prepare and submit the proposal.

Fund Manager Completes:

1. Face Page/SF424 RR
2. Project/Performance Site
3. Senior/Key Personnel/OSC Profiles
4. Table of Contents, if applicable
5. Budget
6. Budget Justification (BJ) – PI provides personnel and other line item expense justifications. FM adds benefit rates used, escalation factor, TIF justification, and ensures BJ follows the same order as the Budget, and all items are justified.
7. Obtains all BioSketches, **REVIEWS** to assure they comply with formatting rules
8. All Internal Documents*

The Fund Manager is also responsible for the following:

1. **Reviewing all sections provided by the PI and other researchers to ensure sections comply with Agency policies and formatting rules.**
2. Following up with Key Personnel and Subawardees to ensure all required documentation is received.
 - a. BioSketches
 - b. Professional Profile information
 - c. Current salary information if you do not have access in UCPath
 - d. Letters of Support (if applicable)
 - e. [Subawards](#):
 - i. Subrecipient Commitment Form or LOI or MCA
 - ii. Institutional Profile information
 - iii. Performance Site information
 - iv. Resources Page/Equipment from Subawardee
 - v. Scope of Work
 - vi. Budget and Budget Justifications

3. Compiling the proposal, paginating, formatting, and saving electronic copies to shared drive and/or forwarding to central office.
4. Submitting to OCGA/DOM DRA in a timely manner so they have enough time to thoroughly review the proposal prior to submission.
 - a. **At least 5 business days** prior to Agency due date for OCGA
 - b. **At least 3 business days** prior to Agency due date for DOM DRA*
5. Correcting any issues found by OCGA/DOM DRA review.
6. Obtaining OCGA's signature on agency forms (if applicable).
7. Ensuring the proposal is submitted to the agency on time.
8. *Once proposal is submitted by DOM DRA, attach the eGRANT version of the proposal to the EPASS system and electronically submit EPASS to OCGA.

*Internal Documents

1. [EPASS](#)
2. [Conflict of Interest \(COI\) Forms](#)
 - a. 740 and/or 700U – include applicable addendums. See [Disclosure Matrix](#) to determine with COI form to submit for sponsoring Agency.
 - b. For PHS applications, confirm the KP have completed the [eDGE electronic conflict of Interest \(eCOI\)](#) within the past year
3. [PI Exception Letter](#) – if applicable
4. [DOM PI Responsibilities Form](#) – if proposal contains Human Subjects
5. Obtain completed either [Subrecipient Commitment Form](#) or [Letter of Intent](#) (LOI) from each non-UC Subawardee.
 - a. LOI is only for FDP Expanded Pilot Subrecipients that appear on [FDP list](#).
 - b. For UC Subawardees, obtain completed [Multi-Campus Award Commitment Form](#).

PI Completes:

1. Cover Letter, if applicable
2. Project Summary/Abstract
3. Project Narrative/Relevance to Public Health
4. BioSketch for PI
5. Budget Justification – FM assists with canned language, e.g. benefit rates used, escalation factor, TIF
6. Facilities & Other Resources
7. Equipment, if applicable
8. Research Plan – all sections, i.e. Reference Cited, Research Plan, Vertebrate Animals, Human Subjects, Resource Sharing Plan, Multiple PI Leadership Plan, etc.
9. Appendix material – if applicable
10. [PHS Assignment Request Form](#), if applicable
11. Electronic Conflict of Interest in the [eDGE System](#) – confirm it has been updated within the past year