

PROPOSAL PREPARATION

Revised March 15, 2017

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. Notify OCGA and/or DOM DRA of proposal by providing PI name & division, agency, agency deadline date, RFA/PA # and any other helpful information – i.e. modular/detailed, subs?
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 – 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 EDB
 - 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 making all required copies (agency, OCGA, departmental, divisional).
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 mailed/submitted to the agency on time.
 - a. Obtain UPS/FedEx tracking number in order to track hard copy proposal packages.
8. Ensure all Internal Documents along with a copy of the proposal are submitted to Steve Chorna (for Farah's signature on the EPASS) **within 5 business days** of proposal submission.

*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 Other Support Form](#)
5. [DOM Proposal Checklist](#)
6. [DOM PI Responsibilities Form](#) – if proposal contains Human Subjects
7. 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. Project Summary/Abstract
2. Project Narrative/Relevance to Public Health
3. BioSketch for PI
4. Budget Justification – FM assists with canned language, e.g. benefit rates used, escalation factor, TIF
5. Resources Page/Equipment
6. All sections of the Research Plan (Reference Cited, Research Plan, Vertebrate Animals, Human Subjects, Resource Sharing Plan, Multiple PI Leadership Plan, etc.)
7. Appendix material – if applicable
8. Electronic Conflict of Interest in the [eDGE System](#) – confirm it has been updated recently