

Step Guide on Proposal Development Process

Step Work

Role(s) Involved: O=Owner; C=Contributors--as needed/available

I. Make Decision—30% of time on Stages I, II, III

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| 1. Review proposal opportunity & support docs | O—PI; C—Mentors |
| 2. Contact critical officials for feedback | O—PI; C—Program Officer; mentors;
O—Campus Sponsored Research Office (SRO) and Campus officials |
| 3. Decide whether to apply | O—PI |

II. Organize Process

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| 4. Review requirements, gather data, identify gaps | O—PI; C—Colleagues & mentors |
| 5. Set schedule | O—PI; C—Department Chair |
| 6. Do initial budget estimate & level of effort | O—PI; C—Department Chair; equipment OEMs; service suppliers |
| 7. Determine required submission method | O—PI; C—Colleagues; Campus Sponsored Research Office (SRO); Program Officer |
| 8. Hold kickoff/strategy session | O—PI; C—Any roles that PI cannot fill |

III. Prepare Content

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| 9. Review known/assumed requirements | O—PI; C—Colleagues |
| 10. Conduct literature review; collect data from all sources | O—PI; C—Colleagues; CSU boilerplate library; mentors |
| 11. Ask Program Officer or SRO about any questions | O—PI; C—Program official; SRO |
| 12. From template, draft outline—tech, outreach, career | O—PI; C—Colleagues |
| 13. Review outline | O—PI; C—Colleagues |
| 14. Identify gaps—data, expertise, facilities, equipment | O—PI; C—Colleagues; mentors; Department Chair |
| 15. Request department support letter | O—PI |
| 16. Fill gaps; revise plan based on how well PI filled gaps | O—PI; C—Colleagues & mentors |

IV. Write—40% of time

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| 17. Write draft text: project plan, bio, & 2 nd budget estimate | O—PI; C—Colleagues & mentors |
| 18. Create draft art | O—PI; C—Graphic artist |
| 19. Polish draft for review | O—PI; C—Colleagues; desktop specialist |
| 20. Draft department letter | O—Department Chair |

V. Review & Revise—30% of time for Stages V

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| 21. Refine content for draft | O—PI |
| 22. Review draft; supply feedback to PI | O—Reviewers |
| 23. Incorporate review suggestions; revise text & art | O—PI; C—Graphic artist |
| 24. Set final budget; adjust plan based on budget issues | O—PI; C—Colleagues & mentors |
| 25. Do final content QA check & fixes | O—PI; C—Colleagues & mentors |
| 26. Determine if department letter needs revisions; request | O—PI |
| 27. If department letter needs revisions, obtain them | O—PI & Department Chair |
| 28. Create final version | O—PI; C—Desktop specialist |
| 29. Do a test run in submission tool if it is not email | O—PI |

VI. Produce

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| 30. Produce package | O—PI; C—Desktop specialist |
| 31. Upload to online tool or email | O—PI; C—SRO; colleague (“buddy system”—for successful, timely upload) |

VII. Process Post-Submission

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| 32. Conduct lessons learned session | O—PI; C—All people who contributed to the process |
| 33. Select /enter material for CSU and PI’s libraries | O—PI |