ABC 2016 Fall Summit

Grants Development

*Pre-Award proposal review and approval process*

September 8, 2016

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Recognize These?

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Impact of Research & Sponsored Programs

- New and innovative programs for students
- Faculty and staff acquire financial resources to support student learning/success
- Faculty professional development

Objectives of Proposal Routing

- Fulfills a Chancellor’s Office requirement
- Allows units to review documents and resource commitments before submission
  - Resources may include
    - Courses
    - Space
    - Cost share funding
Proposal Process

Faculty Member identifies project/funding opportunity

Faculty member creates proposal and budget with help from GDO

GDO prepares routing and submission documents

Proposal routes for campus approval

Proposal submitted to sponsor

Objectives of Open Account Memo

- Approval of spending in advance of award
  - If award not received, spending reimbursed from other sources
  - Approval needed from units that would reimburse costs if award not received
Open Account Memo Process

1. PI needs to spend funds before the contract/award document is final
2. PI reaches out to GDO
3. GDO reviews the risk of advancing funds and prepares memo
4. Memo routed for approvals
5. GDO provides to Sponsored Programs who allow spending to begin

Objectives of Revision Routing

- Changes in a proposed or active project
  - Faculty effort – used for scheduling and budget
  - Project Period
  - Total amount requested/awarded
  - Scope of Work
  - PI Change
  - Also database changes
    - Title
    - Sponsor name
    - Minor corrections
Revision Process

- Identified as needed by GDO, SPO, and/or PI
- Completed in GDO database
- Sent to individuals to approve
- Once signed, sent to SPO or Sponsor as needed

DocuSign

- GDO Early adopters of DocuSign
  - Supports electronic routing
  - Links to documents arrive via email
  - Sign on with your Cal Poly ID and password
  - Using DocuSign for the first time
  - DocuSign and location sharing
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