University College

PROPOSAL DEVELOPMENT CHECKLIST

☐ Obtain Request for Proposal (RFP) and review thoroughly. Familiarize yourself with Pivot, the innovative, commercial; online service to which Penn State subscribes. By using Pivot, you can find RFPs, track updates, get emails regarding potential pertinent funding opportunities and find co-investigators. (http://www.research.psu.edu/osp/find-funding/)

☐ Identify any needed partners within the campus, college, university or outside the university (e.g., community sponsors).

☐ Consider for program-related projects:
  ☐ Does proposed project meet the need stated in the RFP?
  ☐ Does it address elements of the campus’s mission and strategic plan?
  ☐ Will it complement or expand existing grant projects?
  ☐ What resources are required, e.g., people, space, equipment, software?
  ☐ Does it duplicate or supplement other efforts?

☐ Consider for research-related projects:
  ☐ Will this strengthen my record for the sixth year P&T review? Discuss with Director of Academic Affairs (DAA).
  ☐ Does the campus have adequate resources (staffing, budget, physical space)?
  ☐ Does the proposed project meet the need stated in the RFP?

☐ Discuss with:
  ☐ Director of Academic Affairs
  ☐ Campus Finance Officer
  ☐ Manager of College Grant Relations: timeline for writing and submission

☐ Will animal or human subjects be used in the research? If yes:
  ☐ Principal Investigator (PI) must complete the required online training from the Office of Research Protections. See web site: http://www.research.psu.edu/orp/
  ☐ Determine whether the agency requires Institutional Review Board (IRB) approval of research involving human or animal subjects prior to submission. If it does, adjust timeline accordingly. Most agencies do not. University policy requires IRB approval before the award can be accepted, but not necessarily before the proposal is submitted.

☐ Review the RFP guidelines and outline the proposal.

☐ Develop timetable for complete project:
  ☐ Writing proposal: see Proposal Writing Checklist
  ☐ Animal or human subjects reviews, if necessary
  ☐ Review by colleagues
  ☐ Editing
  ☐ Development of budget: see Proposed Budget Checklist
☐ Preparation of appendices and other required attachments
☐ Submission of proposal: see Proposal Submission Checklist
☐ If more than one person is working on the project, assign responsibilities

ALLOW PLENTY OF TIME

Missing the deadline is one of the top reasons proposals are rejected.

IMPORTANT REMINDER

UNIVERSITY COLLEGE FACULTY AND STAFF CANNOT SUBMIT PROPOSALS DIRECTLY TO THE EXTERNAL FUNDING AGENCIES.

- All proposals for external funding must undergo review and approval by the Dean of the University College.