Identify funding opportunity to pursue

Assess funding opportunity, requirements and deadlines. Create proposal preparation plan/checklist. Consult with PI on PI plan, critical deadlines, budget and personnel needs.

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Develop scope of work.

Provide subaward info. Provide technical and necessary application documents to RA for consolidation.

Work with RA to complete checklist

Consolidate materials and information

Complete final technical (science) section of research plan

Upload complete proposal documents in Phoebe

PI (& Co-PIs) approve in Phoebe

Complete proposal review and approval

Send RA & PI letter of commitment form

Make revisions if required by Central Campus

Submit proposal to Sponsor

Sponsor receives application

This process document is current effective 11/24/2014

If you have questions about this document please contact ptimaps@lists.berkeley.edu
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Assess funding opportunity, requirements and deadlines. Create proposal preparation plan/checklist. Consult with PI on PI plan, critical deadlines, budget and personnel needs.

Develop scope of work. Provide subaward info. Provide technical and necessary application documents to RA for consolidation.

Complete checklist.

Consolidate materials and information.

Complete final technical (science) section of research plan.

Upload complete proposal documents in Phoebe 5 days before due to Sponsor.

PI (& Co-PIs) approve in Phoebe.

Complete proposal review and approval.

Make revisions if required by Central Campus.

Send RA & PI letter of commitment form.

Submit proposal to Sponsor by Sponsor due date.

Sponsor receives application.

**Responsible:** owner of the task.  
**Accountable:** the one ultimately answerable for the correct and thorough completion of the task.  
**Consulted:** provides information and/or expertise necessary to complete the task .  
**Informed:** needs to be notified of results
CSS RA – Proposal Development

As soon as funding opportunity is identified

At least 5 days before submission deadline

By the submission deadline 06/05/2014

1. Identify funding opportunity to pursue
2. Send PI the checklist, forms, deadlines, and R&R
3. Work with PI to complete proposal requirements according to the RFP
4. Receive and review proposal
5. Store documents in proposal share folder
6. Work with PI & SPO/IAO to correct errors
7. Submit final technical section of research plan
8. Complete final technical section of research plan
9. Submit letter of commitment form
10. Submit electronic or paper copies with wet signatures to Sponsor
11. Submit to Sponsor
12. Send RAs a letter of commitment form
13. Confirm with PI that document is ready to submit to Sponsor
14. Submit electronic or paper copies with wet signatures to Sponsor
15. Submit to Sponsor
16. Consent to Plan
17. Create proposal preparation plan
18. Consult with PI on PI plan, critical deadlines, budget and personnel needs
19. Coordinate with other PIs & RAs
20. Reassess plan and timetable
21. Store documents in proposal share folder
22. Initiate proposal in Phoebe, contact SPO/IAO for assistance
23. Send PI the checklist, forms, deadlines, and R&R
24. Complete final technical section of research plan
25. Submit draft proposal
26. Consult with PI & SPO/IAO
27. Consolidate all proposal materials and review for compliance
28. Follow sponsor approval to ensure on-time completion
29. Work with PI to create proposal preparation plan
30. Submit to Sponsor
31. Review and revise proposal
32. Store documents to proposal share folder
33. Start/End

Legend:
- Green: Task
- Red: Deadline
- Blue: Consult
- Orange: Decision Point
- Yellow: Form
- Gray: Notification sent via Email
- Purple: Discussion sent via Email

Guidelines:
- Government Funded
- Subprocess
- Step
- Start/End
- Decision Point
- Form
- Notification sent via Email
- Discussion sent via Email