The Office of Research and Sponsored Programs (ORSP) seeks to assist members of the campus community in pursuing and managing their research and development activities sponsored by internal and/or external agencies and organizations. In order to provide timely support, required checklists and timeframes have been established for successful proposal development and submission. It is the Project Director’s responsibility to ensure that all steps of the Proposal Process Checklist have been completed before grant submission.

**STEP 1: PRE-PROPOSAL ACTIVITIES**

☐ Schedule a meeting with the ORSP staff to discuss funding opportunity at least 30 days before the proposal deadline. **A brief meeting is required even if no assistance is needed with the proposal development.**

☐ Review funding agency’s program requirements, such as cost-share or matching, eligibility restrictions, limitations on the use of funding, etc.

☐ Review proposal guidelines, application instructions, and other key informational resources located in the funding announcement.

☐ Establish a Project Director, Co-Project Director(s), and the writing team to define roles and responsibilities for the proposal process.

**STEP 2: BEGIN PRE-PROPOSAL ACTIVITIES**

☐ Develop preliminary project outline that includes: goal, objectives, and a timeline of events. Feel free to contact the funding agency’s Program Officer with questions regarding your project. They can provide valuable insight on the development of your project.

☐ Develop a preliminary budget to determine what will be needed to implement your proposed project.

☐ Write a one-page executive summary that includes: a statement of need, goals and objectives, organizational background, cost of project and amount requested

☐ Secure possible collaborators or external stakeholders, if applicable. Obtain letters of support, letters of commitment, letters of intent, Memorandum of Understanding (MOU), and other supporting documents with necessary signatures. **These are required five days before the proposal deadline.**

**STEP 3: WRITE PROPOSAL NARRATIVE AND DEVELOP BUDGET**

☐ Gather resources using research studies; peer reviewed journals and articles, and previously funded projects to get an idea of what the funding agency is looking for.

☐ Write narrative according to funding agency requirements which include: content, headings, font, spacing, etc. Technical assistance is available for proposal formatting.
☐ Complete any additionally required attachments such as data management plan, evaluation plan, dissemination, appendices, biographical sketches, key personnel, bibliography, etc.

☐ Develop a detailed budget for cost categories such as personnel costs, salaries, fringe benefits, facilities and administrative costs (indirect), direct costs, materials and supplies, travel, participant costs, equipment, contractual costs, matching and in-kind matching, etc. Technical assistance is available for budget development.

☐ Write a budget narrative according to the funding agency’s guidelines that justify each category of funding requested. It is essential to show how the amounts were calculated.

STEP 4: SUBMISSION

☐ The ORSP can review, edit, or critique your final proposal for grammatical errors and content. **Remember to keep your proposal clear and concise.** The ORSP will review the final proposal up to three times before submission.

☐ Begin internal routing via Cayuse (formally Evisions) for department approval and signatures. It is the Project Director’s responsibility to initiate the internal routing process. Technical assistance is available at [www.utm.edu/cayuse/](http://www.utm.edu/cayuse/) for accessing and routing instructions.

☐ Once approval and signatures have been obtained, compile and submit all finalized proposal documents to the ORSP. Proposals must be in the correct format (i.e., PDF or DOC) before submission. **All grant proposals must be submitted to the ORSP no later than 5 working days before the proposal deadline.** Faculty and staff who provide ORSP with grant documents in 4 days or less are not guaranteed that their proposal will be submitted. ORSP will provide as much support as possible, but at times of heavy-volume deadlines, proposals will be prioritized based on when documents were provided to the office (i.e., first-come, first-served).

☐ Congratulate yourself and your proposal development team on a successful proposal development process!

For more information, please contact us a (731) 881-7015 or at orsp@utm.edu.