SMSU External Grants Process Checklist

1. Planning Stage
   a. Brainstorming
      i. Discuss project idea with peers, supervisor, relevant administrative services departments
      ii. Fit with University mission?
      iii. Fit with college/department goals?
      iv. Reflect on personal capacity and expertise to develop, manage, & lead project
      v. Assess University capacity to support project idea
      vi. Determine rough budgetary, space & staffing needs
      vii. Determine technology needs
      viii. What purchasing/contract development needs are there?
      ix. Determine institutional data needs
      x. Assess potential conflicts of interest
      xi. Obtain supervisor approval to proceed
   b. Find Funding Sources
      i. Consult with Advancement
      ii. Search grants literature (e.g., databases, guides)
      iii. Check Advancement web site resources
   c. Review Funding Source Requirements
      i. Timelines
      ii. Matching funds need
      iii. Availability of indirect costs?
      iv. Determine other application requirements
         1. Online submission?
         2. Letters of Support?
         3. Supporting documentation including pertinent institutional data?
         4. Need for Institutional Review Board approval?
         5. Scope of evaluation plan needed?

2. Proposal Development Stage
   a. Develop a timetable for completing necessary steps
   b. Organize needed resources to prepare application/proposal
   c. Prepare a draft narrative and budget
   d. Initiate internal review process of draft narrative and budget
      i. Consult with Advancement (required)
      ii. Consult with Business Services (required)
      iii. Consult with Information Technology Services (if computer technology elements are involved in the project)
      iv. Consult with Institutional Research (if University data is needed for proposal)
      v. Consult with Institutional Review Board (if a research study is part of the project)
      vi. Consult with peers
   e. Finalize proposal narrative and budget

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3. Proposal Submission to Funding Agency
    a. Obtain necessary authorizations and approvals to submit external proposal
    b. Compile necessary materials and documentation
    c. Obtain necessary technical support for application processing

4. Post-Award
    a. Follow awardee process
    b. Comply to institutional processes
    c. Manage financial obligation
    d. Stay within budget
    e. Fulfill promise
    f. Monitoring outcomes
    g. Evaluate impact
    h. Stewardship

Additional Materials Needed for Advancement Website
1. Resources Page (e.g., funding agency information, grants tips)
2. Workflow Diagrams

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