Large-Scale Proposal - Critical Tasks Checklist

Team Formation *(~12-24 months in advance)*

- ☐ Identify the research area and existing knowledge gaps Identify collaborators across colleges/departments, institutions, stages of career, etc. with expertise missing to address the knowledge gaps
- ☐ Meet as a team to further develop research objectives
- ☐ Create a collaboration plan
- ☐ Apply for pilot/seed grants, collect preliminary data, publish together, write a white paper
- ☐ Hold a workshop to identify more collaborators and partners, including industry and community partners

Identify Funding Opportunity *(~12 months in advance)*

- ☐ Set up searches in Pivot, look at previously funded awards that might be fit for your work
- ☐ Consult with the U-M library or research development offices to help identify relevant funding opportunities
- ☐ Reach out to program officers to discuss alignment with the call
- ☐ Determine if you need to shift the scope of work and/or expand your team

Develop Proposal (*6-12 months before deadline*)

- ☐ Check the call to see if it is a limited submission; if so, apply for internal approval
- ☐ Connect with the Research Development Office in OVPR for proposal support
- ☐ Connect with your research administrator (RA) to initiate PAF, draft budget, subcontracts, and confirm required documents
- ☐ Schedule regular team and subgroup meetings
- ☐ Develop a detailed timeline & checklist, working backward from the ORSP submission date:
    - Include peer-review, red team reviews, extra time to circulate drafts
    - Build in time to develop overview graphics and tables
    - Read the notice carefully to make sure you prepare the required documents
    - Develop a style guide and/or templates to keep the required formatting
    - Keep a list of commonly used acronyms and abbreviations used in the proposal
- ☐ Pay attention to deadlines for letters of intent/request and/or preliminary proposal

Finalize Proposal *(3-6 months before deadline)*

- ☐ Reach out at least 2 months in advance for letters of support/collaboration, including institutional support and cost share
    - For industry or community outreach, start outreach sooner if possible.
- ☐ Write and submit pre-proposal or letter of intent/request if suggested or required

Finalize Proposal - continued

- ☐ Put together required supplementary documents
  - Work with RA to collect documents from subcontracts
  - Double check formatting, including page limits, font size, margins, etc.
  - Make sure the formatting for all documents is consistent
- ☐ Solicit peer review of your aims and research strategy (i.e., red team review)
- ☐ Refine, review, and finalize all documents, including copy-editing
- ☐ Finalize budget
- ☐ Submit 5 business days in advance for full ORSP review

Site Visit *(6-9 months after submission)*

- ☐ If invited for a site visit, follow the guidance given by the funding agency for the presentations
- ☐ Make sure the entire team can attend site visit
- ☐ Develop a playbook for a site visit with anticipated questions and answers
- ☐ Have multiple rehearsals with colleagues who have experience with site visits
- ☐ During the site visit:
  - Use the same background for the team
  - Have Slack or other instant messaging open to communicate (if the site visit is virtual)
- ☐ Debrief and assign action items based on feedback from the visit