**Stop #1: Basic Information**

Funding Agency:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Program Title:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Duration of Grant (Circle/highlight one):

1 year 2 years 3 years 4 years 5 years Other:

Maximum Budget Amount: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Stop #2: Required Components Checklist**

*Start in the Table of Contents. Look for an Application Checklist, Submission Requirements, or something similar.*

*Working with NSF? See the standard list of components on the next page, then review the solicitation section titled “Proposal Preparation Instructions” for program-specific attachments.*

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2024 NSF Standard Components

(Effective May 20, 2024)

1. Project Summary [1 page]
2. Project Description [15 pages unless otherwise noted]
3. References Cited [list all author names]
4. Proposal Budget
5. Budget Justification [5 pages]
6. Facilities, Equipment and Other Resources
7. Data Management Plan [2 pages]
8. Biographical Sketch created on [SciENcv](https://www.ncbi.nlm.nih.gov/sciencv/) [per each senior personnel]
9. Synergistic Activities [1 page, per each senior personnel]
10. Current and Pending Support created on [SciENcv](https://www.ncbi.nlm.nih.gov/sciencv/) [per each senior personnel]
11. Collaborators and Other Affiliations Form [per each senior personnel]
12. Mentoring Plan [if you plan to hire graduate students or postdocs]

**Stop #3: Program Requirements**

What activities are required by the grant program?

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What activities are encouraged/allowed/optional for this grant program?

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**Stop #4: Partnerships**

Collaborations need to be intentional. Think through the following questions:

* Who should I partner with on this project?
* Why is that person/organization best suited to work on this project?
* What part of the project will they be responsible for?

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| Potential Partner | What do they bring to the table? |
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**Stop #5: Initial Planning**

Problem Statement: What challenge are you addressing?

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| Resources/Inputs: What do you bring to the table? What does the university already have on hand in terms of facilities, equipment, people, and other resources? | Outputs: What is your strategy? How will the activities will be performed? |
| Outcomes: What do you expect to be the direct results of your strategies and activities (short-term outcomes)? What overarching effect on the community do you wish to have (long-term outcomes)? | Assumptions: What is the premise of your approach to the problem statement? Are there external factors that could affect the outcome of your project? |

**Stop #6: Biosketch/CV**

*Similar to applying for a job, the CV or Biosketch you submit should be tailored towards the grant program. Choose publications and synergistic activities (committee memberships, mentoring roles, etc.) that show you are best suited to lead this project.*

|  |
| --- |
| List up to 5 of your publications that are directly related to the project |
| List up to 5 of your publications that are adjacent to the project |
| List up to 5 synergistic activities that complement the project |
| Non-NSF: If you do not have many publications, list additional synergistic activities here |

**Stop #7: Data Management Plan**

*Even if a data management plan is not required, it is a good idea to think through how you will manage data and incorporate that information into your proposal narrative.*

What kind of data will be generated by your project activities (whether you intentionally collect it or not)?

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What format will the data be in (e.g., software code, text documents, XML files, websites, image files, data tables, or physical materials)?

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How will you store these data, and for how long?

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Who will have access to the data? Who will be responsible for managing the data?

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Will you share the data? How? What will be your policy on reuse and redistribution?

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**Stop #8: Evaluation**

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| Expand on your outcomes from page 3; turn them into distinct, measurable objectives here. |
| When/how often will you measure your objectives? |
| External evaluators are recommended to avoid bias. If you have external evaluator(s) in mind, list them here. *External does not necessarily mean external to the university; you can choose someone on campus who has no other association with your project.* |

**Stop #9: Outline**

*Find the criteria, narrative sections, or similar wording in the grant program requirements. List each criterion/section heading below, and roughly outline how you will address it based on everything you have worked on so far.*

# Narrative Section (NSF)/Review Criteria (Others) 1

## Objective that meets criteria

### Activity that accomplishes objective

**Stop #10: Budget**

*The following expense categories are commonly seen on federal grant budgets. Use this guide to determine what is needed for the project, then transfer your line items to the budget planner at the end of this workbook or a spreadsheet.*

|  |  |  |
| --- | --- | --- |
| **Salary**  The amount of salary charged for each person should correspond with the amount of time spent on the project.  Faculty pay can be expressed as one or more course releases (12.5% of annual salary each) or summer months (11.11% of annual salary each). | | |
| Senior/Key Personnel:   * PI * Co-PI(s)   Other Personnel:   * Post Doc * Grad Student * Undergrad Student * Clerical | | |
| **Justification**: How much money is being requested for each team member, how much of their time does this represent, and why are they essential to the project (what role will they play in the project)? | | |
| **Fringe Benefits**  Fringe benefits include the payroll taxes and insurance that the employer pays (FICA, unemployment, workers compensation, etc.) | | |
| Faculty Fall/Spring Pay and Full-time Staff: 36%  Faculty Summer Pay: 17.5% | | Part-time Staff: 15%  Students: 15% |
| Each line item in the Salary category needs a corresponding line item in the Fringe category. | | |
| **Capital Equipment**  This category is typically defined as equipment valued at greater than $5,000 per unit with a useful life of more than one year. *Effective October 1, 2024, this threshold rises to $10,000.* | | |
| **Justification**: Include a vendor quote for the instrument, break down the cost of the various components, and explain why this equipment is essential to the project. | | |
| **Domestic/International Travel**  Travel can encompass expenses incurred while facilitating project activities away from the primary site and required meetings or conferences. | | |
| Airfare/Mileage:  Meals:  Lodging:  Ground transportation:  Registration fees: | | |
| **Justification**: What is the basis for these cost estimates (GSA per diem/mileage rates, previous travel expenses), and why are these trips necessary? | | |
| **Participant Support Costs**  This category includes expenses that support non-employee participation in training activities. Incentives for human subjects should not be included here. | | |
| Tuition:  Stipend:  Travel:  Subsistence:  Other: | | |
| **Justification**: How many participants do you anticipate serving, how much money is needed for each category, and on what were these costs based? | | |
| **Materials and Supplies**  This includes consumable goods needed specifically for the project beyond basic office supplies. | | |
|  | | |
| **Justification**: What is the per unit cost for each item, how much of each item is needed per year, and on what were these cost estimates based (vendor quote, previous purchases, etc.)? | | |
| **Publication Costs**  Some peer-reviewed journals require fees for publishing scholarly work. Those fees can be charged to the grant if the article results from the grant project. | | |
|  | | |
| **Justification**: To which journals are you planning to submit articles, what is their rate, and why is this important to the project? | | |
| **Consultant Services**  This category includes all services, such as consultants and external evaluators. | | |
|  | | |
| **Justification**: Who will be hired to do what, what is their fee rate, and why is this consultant essential to the project? | | |
| **Subawards/Contractual**  This category includes all subawards issued to other institutions and large contracts. | | |
| Subawards:  Contracts: | | |
| **Justification**: Provide an explanation for the expense categories presented in the subaward budget. This should be prepared by the institution submitting the subaward budget. | | |
| **Matching Funds/Cost Sharing**  Some funding agencies require a cost share or matching funds as a condition of awarding the grant which represents a contribution of funds from the applicant to the project.  The funding agency will specify exactly how much is required and in what form the match/cost share can take (cash, goods, or services).  Do not voluntarily offer a cost share or matching funds if not required. | | |
| Is cost match/share required? Yes No  If yes, what is the rate? | | |
| **Indirect Cost (IDC)**  Also referred to as “F&A” costs or “overhead”. IDC covers the institution’s expenses incurred by the project but not directly charged to the project such as utilities, rent, and various administrative costs. IDC is required for all federal grants unless otherwise stated and is applied to other state and local grants as allowed by the agency.  Circle/highlight the IDC rate that applies: | | |
| On-campus rate: 48%  Off-campus rate: 22% | Other (noted in the instructions)  Not allowed | |
| **Justification**: Contact OSP for the current boilerplate language for this section. | | |

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| **Budget Planner 1 Year** |  |  |  |
|  | **Base Rate** | **Quantity** | **Total** |
| **Senior Personnel** |  |  |  |
| PI |  |  |  |
| Co-PIs |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Other Personnel** |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Fringe** |  |  |  |
| Senior Personnel |  |  |  |
| Other Personnel |  |  |  |
|  |  |  |  |
| **Capital Equipment** |  |  |  |
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| **Travel - Domestic** |  |  |  |
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| **Travel - International** |  |  |  |
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| **Participant Support** |  |  |  |
| Tuition |  |  |  |
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| Subsistence |  |  |  |
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| **Materials and Supplies** |  |  |  |
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| **Publication Costs** |  |  |  |
|  |  |  |  |
| **Consultant Services** |  |  |  |
|  |  |  |  |
| **Subawards** |  |  |  |
|  |  |  |  |
| **Indirect Costs** |  |  |  |
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| **Total Direct Costs** |  |  |  |