

Table 1. 12 Week timeline for large interdisciplinary proposal development.

Goal Proposal Process – 12 Week Example	Framing Phase				Collaboration Phase				Refinement Phase			
	Week: 1	2	3	4	5	6	7	8	9	10	11	12
Analysis and Planning												
Distribute RFP; Gather Intelligence; Recruit PI	Univ/DV											
Finalize Key Participant & Potential Collaborator Lists			PI									
Problem Development												
Define Vision & Goals; Identify Themes/Discriminators	PI		●									
Develop Proposal Outline & Estimate Budget			PI/RA									
Cost Share Discussion w/ Advocate			PI/RA/DV									
Identify Resources for Complex Admin Issues (e.g., IP)"			PI/RA/DV									
Assess Needs and Coordinate Institutional Data			PI/RA/DV									
Refine Outline with Project team				PI								
Identify & Draft Potential Graphics			PI									
Program Officer Input												
Contact Program Officer/Advisors for Feedback				PI								
Refine Outline/Themes with Project Team				PI/DV								
Partnerships												
Recruit External/Internal Partners			PI/DV									
Refine External/Internal Partner Involvement					PI/DV							
Solicit and Obtain Support Letters							PI/DV					
Management/Personnel												
Identify Management Structure					PI							
Collect and Edit Biosketches/C&Ps/Appendices						PI/RA						
Final Check on Participant List						PI/RA/DV						
Write and Secure Internal Commitment Letters							PI/RA/DV					
Budget												
Construct 1st draft of Internal (PSU) budget			PI/RA									
Determine External Partner Needs and Distribution				PI/RA								
Determine Cost Share Needs (if any); schedule MCM						PI/RA						
Refine Overall Budget						PI/RA						
Secure Cost Share (if any)								PI/RA				
Final Budget and Justification								PI/RA		★		
Proposal Writing												
Assign writing sections				PI		●						
Write Section Components						PI/DV						
Compile Draft 1							PI/DV					
Writing Team Edit							PI/DV					
Red Team Review								PI/DV		●		
Address Red Team Comments								PI/DV				
Editing Iterations								PI/DV				
Compliance Checks and PIAF Signoff												All

● = Advocate Approval; Note: Blue Coded text Indicates Advocate Involvement

★ Final Budget (external partners included) 1 week prior to deadline ■ Final technical pieces and supplemental documents 48 hours prior

Table 2. Roles and responsibilities by phase of proposal timeline.

Player	Phase 1: Framing	Phase 2: Collaboration	Phase 3: Refinement
<p>Principal Investigator (PI) *Needs to be supportive of the 12-week plan. Ultimately controls the process, but relies on key players to complete tasks and stay on the timeline.</p>	<ul style="list-style-type: none"> • Finalize key participant & collaborator list; Recruit partners • Define proposal outline (incl. Vision, Goals, & Themes) • Start writing assignment outline • Identify graphics • Draft/estimate budget • Identify necessary University resources (Admin Issues, Space, Data, Cost Share) • Interpret solicitation, and identify appropriate teaming strategies 	<ul style="list-style-type: none"> • Refine partner participation; identify external commitment letters • Finalize writing assignments • Identify management structure • Refine budget and cost share • Identify internal commitment letters • Compile technical plan draft text and prepare for University review 	<ul style="list-style-type: none"> • Track writing assignments & follow-up with missing contributions • Finalize management structure • Finalize budget, justification and cost share • Finalize Commitment Letters (internal/external) • Review technical plan and make final edits based on University review • Verify that Institutional approvals have been obtained to submit the proposal
<p>Advocate (AV) *Needs to be identified by University and PI. We recommend an institutional administrator (i.e. Research Dean, Institute Director, Department Head)</p>	<ul style="list-style-type: none"> • Participate in University limited submission process • Contact with PI to verify necessary University resources (space, cost share, admin support) • Verify that the PI has completed initial proposal vision/goals outline 	<ul style="list-style-type: none"> • Verify writing assignments and draft text components are on track. • Support the PI 	<ul style="list-style-type: none"> • Participate in the proposal University review • Support the PI • Verify that University approvals have been obtained to submit the proposal
<p>University</p>	<ul style="list-style-type: none"> • Organize limited submission process • Select and support PI/Advocate with necessary resources 		
<p>Development Specialist (DV) *Are typically Masters or PhD-level professionals who serve as catalysts in the proposal process and participants in writing/editing</p>	<ul style="list-style-type: none"> • Serve as a catalyst in University limited submission process • Assist PI in conceptualizing Draft/estimate budget • Identify necessary University resources (Admin Issues, Space, Data, Cost Share, outreach, diversity) • Interpret solicitation, and identify appropriate teaming strategies 	<ul style="list-style-type: none"> • Refine partner participation • Coordinate drafts for non-technical proposal pieces • Assist w/ commitment letters (internal/external) • Help compile technical plan draft text and prepare for University review • Edit text if necessary 	<ul style="list-style-type: none"> • Assist w/ finalizing commitment letters • Coordinate and make final edits based on University review
<p>Research Administrators (RAs) *University authority for proposal submission. Assist w/ compliance, budget and administrative functions.</p>	<ul style="list-style-type: none"> • Draft/estimate budget • Identify necessary University resources (Admin Issues, Space, Data, Cost Share) • Interpret solicitation, provide feedback; contact sponsor if necessary 	<ul style="list-style-type: none"> • Contact participants for Biosketches, Current/Pending Support, CIO tables, Appendix material • Refine budget and cost share • Assist w/ commitment letters (internal/external) • Compile draft text 	<ul style="list-style-type: none"> • Finalize budget, justification and cost share • Assist with finalizing commitment letters • Review proposal text for compliance issues • Verify that University approvals have been obtained to submit the proposal