**UWGB Office of Grants & Research 3-Week Check-in Guide**

**(30 min)**

**Overview:** Office of Grants & Research (OGR) staff contacts principal investigators (PI’s) approximately three weeks prior to the external agency’s proposal submission deadline. The purpose of this discussion is to support the PI during the proposal development process, to prepare the OGR for internal approval, and for final submission to the agency. PIs are not required to provide final project narrative, budget, or other proposal components to OGR staff at the time of the 3-week check-in, but the process and support that OGR is able to provide is enhanced when relatively well-developed drafts are available. OGR staff will discuss the following items during the 3-week check-in:

**1. Confirm (5 min):**

 **(1)** PI name and any other collaborators

 **(2)** Funding agency

 **(3)** Funding opportunity

 **(4)** Agency submission deadline

 **(5)** Internal review and approval routing deadline

**(6)** Agency submission procedure (online portal, email, other)

 **(7)** Agency required components for submission

 **(8)** Responsible person submitting to the agency

**(9)** PI/Co-PI required training status (RCR, COI, etc)

**(10)** Required compliance (IRB, IACUC, IBC, Export Control, etc)

**2. Discussion of proposal budget and budget narrative (20 min):**

 **(1)** Overview of project (3 min elevator pitch)

**(2)** Discuss any project-specific needs (e.g. space, server storage, contracts, etc)

**(3)** Discuss any UWGB match (cash or in-kind) and required approvals/documentation

 **(4)** Discuss any external match (cash or in-kind) and required approvals/documentation

 **(5)** Discuss any sub-recipient budgets and necessary documentation

 **(6)** Discuss any indirect cost restrictions

 **(7)** Discuss any agency-specific budgeting requirements

 **(8)** General discussion of the budget; ensure the PI understands how to calculate:

a) salary and wages,

b) fringe,

c) indirect costs,

d) effort,

e) travel costs,

f) capital equipment, and

g) other project-specific expenses.

**3. Discussion of internal submission checklist and process (5 min):**

OGR staff will walk through the checklist with the PI. Together, the two parties will agree upon the documents required for the PI’s transmittal packet. OGR staff will then explain to whom the transmittal packet will be routed to for review and signatory approval.