



**Strategic Research Initiative
Complex Proposal Project In-Take Form**

Document Purpose: This document is to be shared with PIs and reviewed as part of the initial kick-off meeting with PIs and Research Development Services (RDS). The document will be considered a template document to be reviewed collaboratively, tailored for each individual project by Project Manager (PM), then signed by lead/contact PI and RDS for finalization.

PI Name(s):

Solicitation name and link:

For complex proposal development, RDS will automatically provide resources and templates, grant strategy, and copy edits. Please list below any additional services requested (check all needed for this project):

- Proposal critique
- Graphics (if checked, please complete attached Graphics In-Take Form)
- External reviewer coordination
 - Single review
 - Mock panel/red team review
- Substantial writing (list specific writing components if known)
- Programmatic and organizational structure consultation (e.g. evaluation, advisory committees)
- Institutional data collection (e.g., student data from Institutional Research)
- Institutional support coordination
- Administrative and personnel documents
 - Letters of support
 - Biosketches
 - Other personnel documents:
- Project management support
 - Meeting support
 - Task management
 - Timeline/Gantt chart
 - Work breakdown structure
 - Other:

Anticipated meeting structure and responsibilities (check all needed for this project, add any meeting not listed):

- Kick-off with PI and RDS
 - Led by RDS
- Kick-off with RDS, DGA, and SPA
 - Led by RDS
- Weekly or biweekly “core team” meetings
 - Usually with PI(s), RDS. *Edit attendees as applicable.*
 - Who will lead the meeting?
 - What will the agenda creation process be?
- Small working group ideation meetings
 - Usually with PI(s), RDS, and other key members of project team. (*Edit attendees as applicable.*)
 - Who will lead the meeting?
 - What will the agenda creation process be?
- Small working-group writing meetings
 - Usually with PI(s), RDS, and other key members of project team. If writing groups known, name below.
 - Who will lead the meeting?
 - What will the agenda creation process be?
- Post-submission close out meeting with PI
- Other:

Platform for document sharing:

- SharePoint
- Teams
- Dropbox
- Other:

Who will create/set-up document sharing platform? Who will need immediate access? How will access be administered?

Key Team Member Roles (edit and adjust as needed per project):

Principal Investigator(s)	Research Development Services	Departmental Grant Administrator	Preaward Sponsored Project Admin.
<ul style="list-style-type: none"> • Makes all final decisions on all aspects of proposal and is ultimately responsible for final submission • Leads all ideation and writing • Works with DGA to develop budget and approved final budget decisions (pending SPS approval) • Finalizes EPCS record 	<ul style="list-style-type: none"> • Provides project management as described above • Serves as liaison between PI(s), DGA, and SPA • Coordinates completion of all administrative components of proposal as articulated above • Provides feedback on proposal and project team management • Provides editing and writing as described above • Assists with scheduling as needed • Provides budgetary guidance (if applicable) • Coordinates with external evaluator (if applicable) • Coordinates with graphic designer (if applicable) 	<ul style="list-style-type: none"> • Creates and adds to EPCS record • Creates all budget drafts and uploads budget to EPCS • Coordinates with subaward personnel for budget and key personnel materials (unless RD is completing) • Coordinates collection of personnel materials (unless RDS completing) • Uploads documents to funding agency platform 	<ul style="list-style-type: none"> • Provides final interpretation of funder guidelines • Approves budget and justification • In collaboration with DGA, coordinates with subawardee SPAs at collaborating institutions to collect SPS-required subaward documentation • Responsible for final submission

List below other key members of project team, if known, and what their expected contributions will be. This is most often other intellectual contributors. If unknown, note below at what point in project development these members will be identified:

List scheduled time off for any Key Team members or other personnel critical to the submission of this project that will take place prior to proposal submission. Include team member names, dates out of the office, and names of anyone taking over their duties while they are out.

Standard Key Milestones/Phases: *(Dates to be added below by project manager in advance of meeting then discussed and edited with group)*

RDS detailed scrub of solicitation (shared in advance of kick-off meeting)

LOI and/or preapplication submission (if applicable)

Initial ideation and project team building phase

Final budget due date

Technical writing phase

Admin components writing period

Personnel documents gathering period

External and/or red team review period

Final editing period

Submission!! A calendar appointment with a 7 day reminder will be sent to all key team members based on the deadline for submission in the solicitation.

Grant Figures Intake Form Addendum

The Office of the Vice President for Research and Innovation offers graphic design support for large, complex proposals to provide compelling visuals to articulate the complex research, organizational structures, and objectives of a project.

With one graphic designer on staff, we must be thoughtful in utilizing their time and resources. As such, when working with research teams to develop graphics for a proposal, we can provide a maximum of three iterations on a figure or graphic. Ideally, research teams work with our graphic designer and RDS team to sketch out an overall structure and design scheme using PowerPoint, Google drawing, a whiteboard, etc. that is agreed upon by all research leads **PRIOR** to converting the design in Adobe Illustrator. This enables efficiency in our process and helps our graphic designer to effectively balance multiple priorities for proposals as well as OVPRI internal and external communications.

Please note: Once a graphic is created, if you make any changes to the Illustrator file, please share the it with RDS so we have an accurate version for our records.

The questions below help us to capture project needs and expectations before the design process begins.

1. How many figures do you anticipate you'll need?

2. Provide a high-level summary of the figures needed (e.g., logic model, graphic abstract, org chart).

3. What is the maximum size for each of these figures (i.e., ¼ page, ½ page etc.)? Note: We typically use the smallest readable font size. If you scale down the figure in Word, there is a risk of the text becoming difficult to read.

4. Is there a photo you would like included a part of the graphic?

Yes.

No.

If yes, indicate whether this is a photo you or a team member have personally taken, have the rights to use, or that the photo is in the creative commons to ensure no copyright infringement issues. Please provide .png or .jpg files. It is preferable that you don't provide images in PowerPoint or Word.

5. Please identify who needs to be consulted and who have final approval for each of the requested figures.

6. At what stage are you in developing the necessary figures?

I would like a brainstorm/whiteboard meeting to begin ideation and development.

I have an idea of what I want. *If so, please provide images, files, sketches, etc. Note: If you choose to submit a sketch, no one will judge your artistic abilities! Even stick figures, shapes, and arrows are incredibly useful to help us visualize what you are looking for in a graphic.*

7. Are there any examples of figures you like? If so, please share. [Here are some examples of figures our graphic designer has created.](#)

8. Do you have any color or style preferences?

9. Do you have any Illustrator experience? *Note: This is not necessary; Illustrator is the tool our graphic designer uses, and it helps to know who may make final adjustments or what file types to share.*

Yes.

No.

10. What is your preferred method of providing feedback?

Email

Comments in an online document

Meeting

11. What is your preferred method of communication?

Email

Teams

Both

Notes and Resources

- The font we use is Source Sans Pro, a UO brand font. [Feel free to download and use.](#)
- We will provide the hex numbers of the colors used in the figures.

Project Management Integration

This section will be completed by the Project Manager leading proposal development.

- Link to coordination site (e.g., SharePoint, OneDrive, etc.)
- Link to RFP
- Margin/font specifications